State of Wisconsin
Ethics Commission

Eye on Lobbying

User's Guide

Spring 2017

Lobbying@wi.gov
https://lobbying.wi.gov
(608)266-8123

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General Site Overview

Eye on Lobbying is Wisconsin's lobbying activity reporting system. The system is used for:

- Lobbyist licensing and authorization
- Lobbyist principal registration
- Reporting lobbying activities and expenditures

The Eye on Lobbying site is found at https://lobbying.wi.gov. Members of the public do not need a user account to access the site.

Searching

There are three general ways to search for lobbyist and principal information:

- 'Who is Lobbying?'
- 'What Are They Lobbying About?'
- 'Principal Lobbying Efforts'

The Eye on Lobbying website uses an inclusive search technique. For example, searching for 'tax' would return results for tax, taxes, taxpayer, taxation, payroll tax, and other terms that include the word tax. Using a more specific term in like taxation, would not match with the word tax.

When searching for statutes, use a broad search term like 13 which would match with any reference to chapter 13 of the Wisconsin Statute. A more specific term of 13.63 would limit results to only those related to chapter 13.63 which covers lobbyist licensing.

If searching using a lobbyist's name and are unsure of spelling, use a partial name such as 'Beth' for someone named Elizabeth or Elisabeth.

If searching for a full list of lobbyists, lobbying principals, or state agency officials (legislative liaisons) that lobbying for their agency, go to the **Directories** tab on the navigation bar after logging in.

User Accounts and Passwords

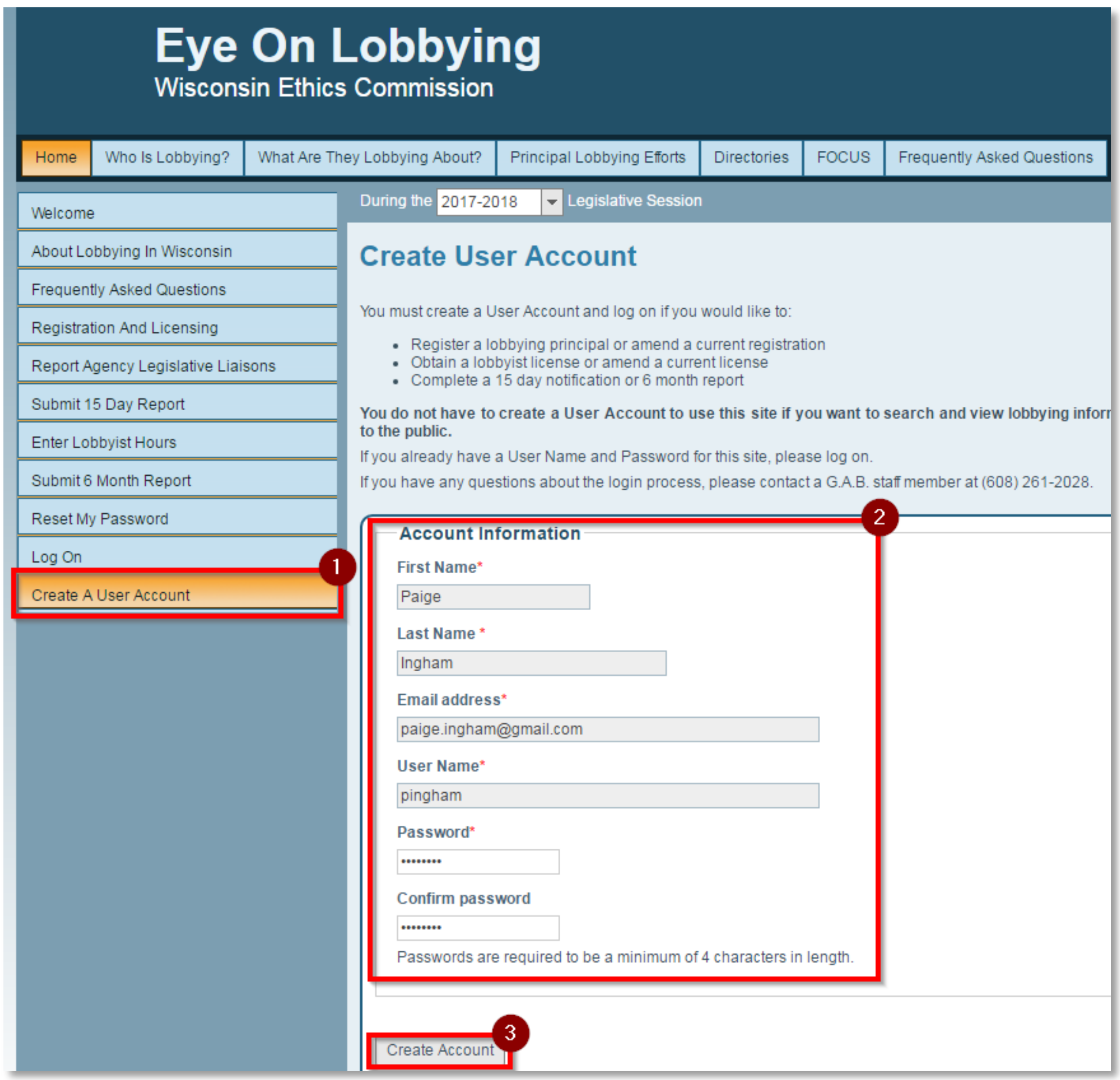
User accounts are not necessary to search for and view lobbying information that is available in Eye on Lobbying. A User Account is only needed to:

- Register a lobbying principal or amend a current registration
- Obtain a lobbyist license or amend a current license
- Complete a 15-day notification or 6 month report

Please contact the Wisconsin Ethics Commission if there are any issues with logging in such as: unsure of username, password, or of previous account.

Creating an Account

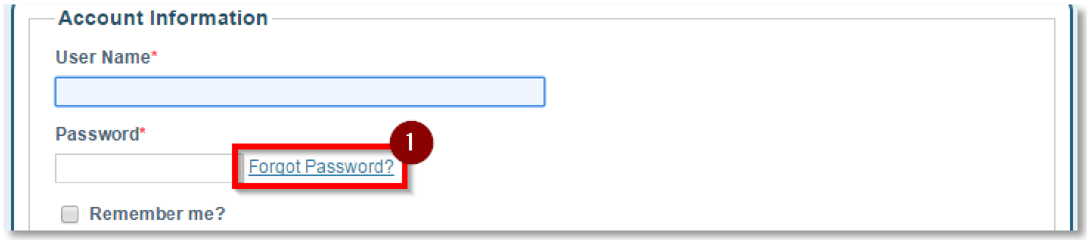
1. To create a user account, click **Create a User Account** on the main left navigation bar.
2. Enter First Name, Last Name, Email Address, preferred User Name, and Password. User names generally use the formula FirstnameLastname (e.g., JoeSchmoe).
3. Click **Create Account**. The user account has been created! A confirmation email will be sent to the email address used to create the account.



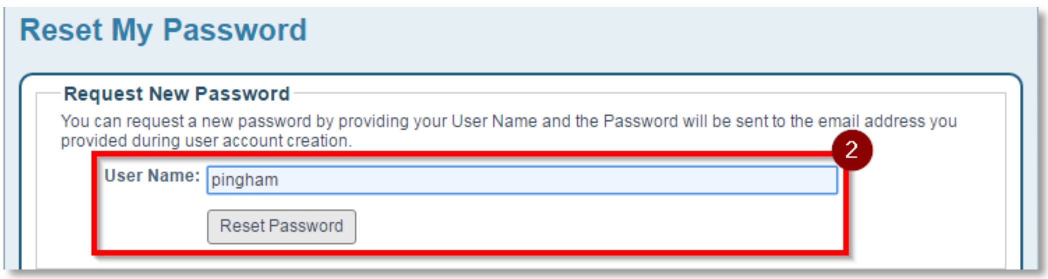
Resetting a Password

User Account passwords can be manually reset if forgotten.

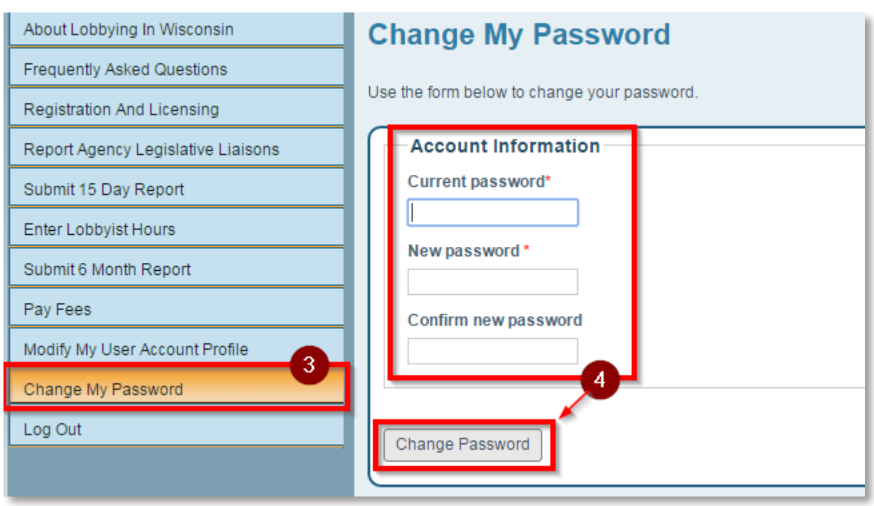
1. From the Log On screen, click **Forgot Password?**



2. Enter the User Name in the available field and click **Reset Password**. A new system-assigned password will be sent to the email associated with the account.



3. When you receive the new password, log in to the account using the new password and manually change the password to something memorable using the **Change My Password** option on the main left navigation bar.
4. Enter the password that was emailed in the Current Password field and the desired password in the New Password and Confirm New Password fields, then click **Change Password**.



Forgotten Account Information

Do not create a new user account if there are problems logging in. Contact the Ethics Commission if there are any issues: (608)266-8123 or lobbying@wi.gov.

Lobbyist Licenses

An individual **must** obtain a lobbyist license if they attempt to influence state legislation or an administrative rule on behalf of a business or organization that employs them or from which they receive payment, *and* that individual communicates with a state official or legislative employee about such matters on five or more days within a six month reporting period.

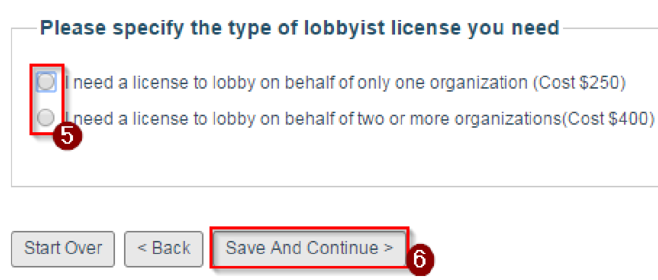
- Individuals acting on behalf of themselves need *not* be licensed or authorized.
- Individuals representing the views of a business or organization but do so as an unpaid volunteer need *not* be licensed or authorized.
- Individuals representing the views of a business or organization they receive payment from, but convey those views only to legislators elected from the Senate and Assembly districts in which they reside, need *not* be licensed or authorized.
- Individuals representing the views of a business or organization they receive payment from and convey those views to all or many legislators or officials but do so only occasionally, up to 4 days within a 6-month period, need *not* be licensed or authorized.

Lobbyist licenses are valid for one legislative session and expire on December 31st of every even numbered year. The Ethics Commission accepts lobbyist license renewals starting on December 1st of every even numbered year.

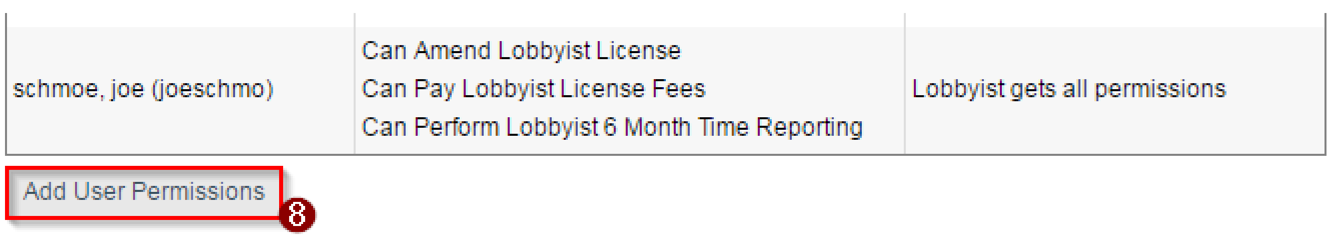
Lobbyists licensed in Wisconsin since 2013 should follow **Renewing a Lobbyist License** instructions. *Please* contact the Wisconsin Ethics Commission for questions about past licensing.

Applying for a New Lobbyist License

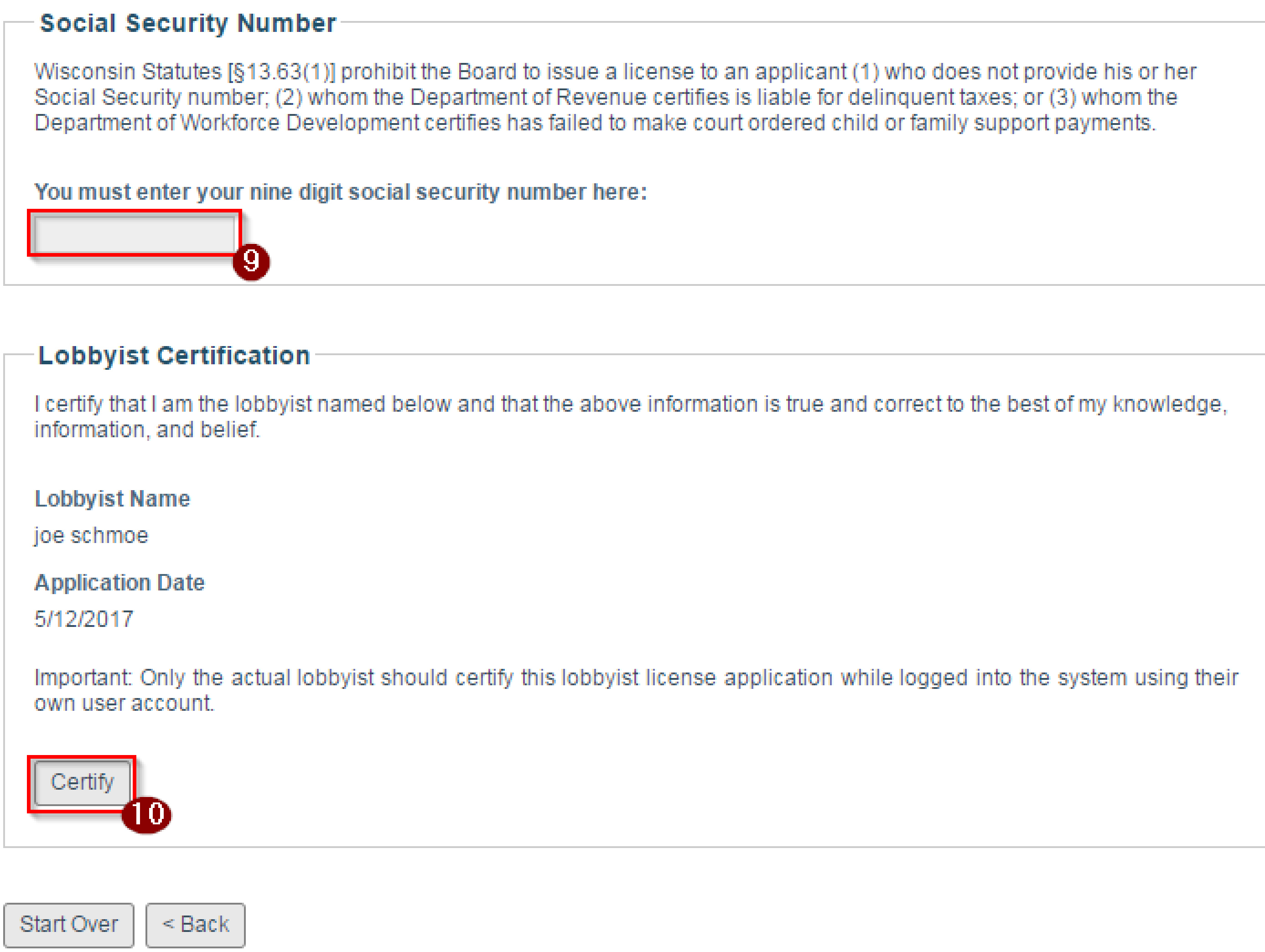
1. Log in to the lobbyist's user account and click **Registration and Licensing** on the left navigation bar.
2. Click **Apply for a Lobbyist License** on the left navigation bar.
3. Click **For New Lobbyist** in the middle of the screen.
4. Enter the lobbyist's information (all fields with an asterisk are required) and click **Save and Continue** (Not pictured).
5. Choose either a *single principal lobbyist license* or a *multiple principal lobbyist license*. This will place the appropriate fees under the 'Pay Fees' tab, located on the left navigation bar of the log in screen.
6. Click **Save and Continue.**



7. Upload a .jpg photo of the user for their profile page, or click **Continue.** This is optional, but strongly encouraged.
8. **Add User Permissions** is *optional* and allows other Users access to this account to pay fees, file reports, or amend information.



9. Enter the lobbyist's **Social Security Number**. The Ethics Commission uses this in collaboration with other agencies to verify eligibility to hold a lobbyist license.
10. **Certify** that the information is correct. *Once eligibility is confirmed and the lobbyist license fee is paid,* the user is able to legally lobby in the state of Wisconsin for the current session.

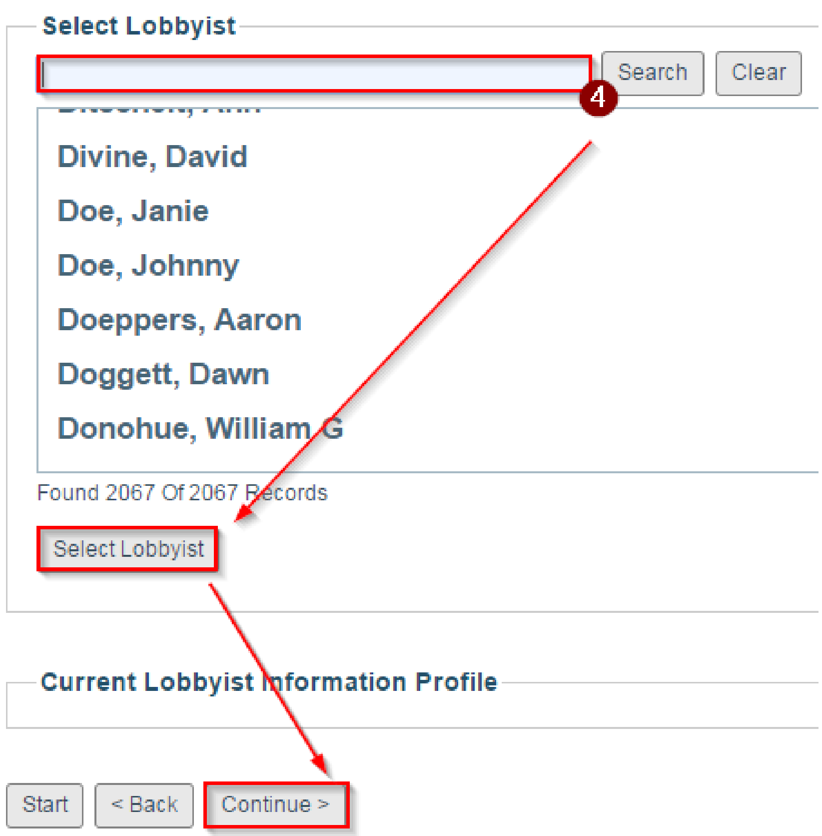


NOTE: Lobbyists are **not licensed** until the Ethics Commission receives the lobbyist's license fee payment and eligibility is confirmed with the Department of Children and Families, the Department of Workforce Development, and Department of Revenue.

Renewing a Lobbyist License

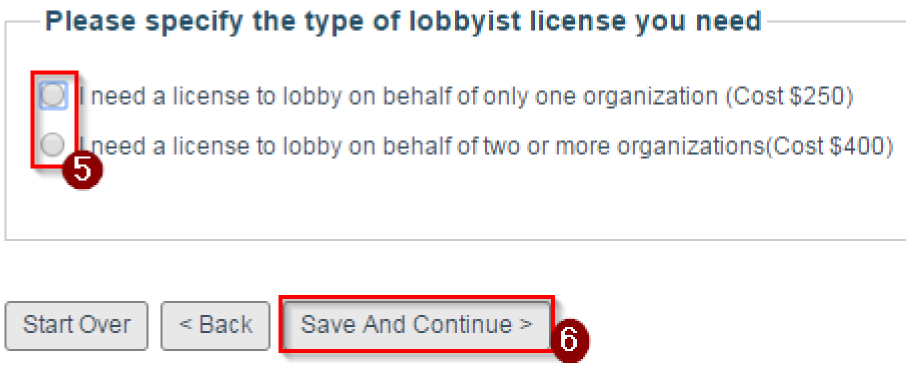
Lobbyist licenses are valid for one legislative session and expire on December 31st of every even numbered year. Starting on December 1st of every even numbered year, the Ethics Commission accepts lobbyist license renewals.

1. Log in to the lobbyist's user account and click **Registration and Licensing** on the left navigation bar (not pictured).
2. Click **Apply for a Lobbyist License** on the left navigation bar (not pictured).
3. Click **Previously Licensed Lobbyist**. This page can also return to a previously started application by choosing the application to complete from the drop-down and clicking **Resume an Incomplete Lobbyist License Application**.



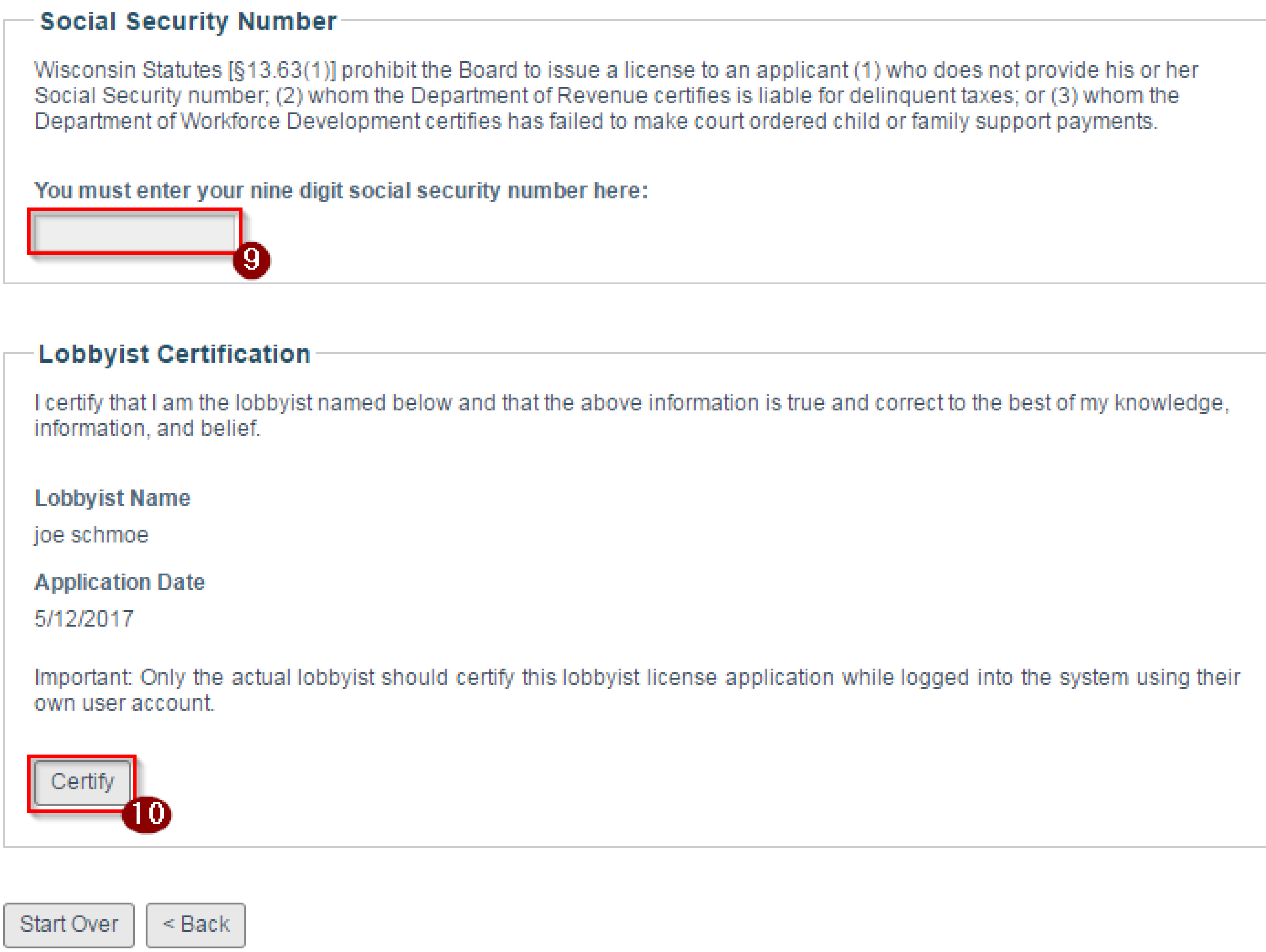
4. Type in the search field the previously licensed lobbyist's name and click **Search.** Click on the name of the lobbyist for renewal and click **Select Lobbyist**. The 'Current Lobbyist Information Profile' will autofill with the lobbyist information. Lastly, click **Continue**. Make any necessary updates to the lobbyist's contact information such as title, phone number, or email address and click **Save and Continue** once more (Not pictured).

5. Choose either a single principal lobbyist license or a multiple principal lobbyist license.
6. Click **Save and Continue.**
7. Upload a .jpg photo for the profile page. This is optional, but strongly encouraged. Click **Continue**.



8. **Add User Permissions** is *optional* and allows other Users access to this account to pay fees, file reports, or amend information.

9. Enter the lobbyist's **Social Security Number**. The Ethics Commission uses this to verify eligibility to hold a lobbyist license with other state agencies.
10. **Certify** that the information is correct. *Once eligibility is confirmed and the lobbyist license fee is paid,* the user is able to legally lobby in the state of Wisconsin for the current session. Congratulations!


Social Security Number

Wisconsin Statutes [§13.63(1)] prohibit the Board to issue a license to an applicant (1) who does not provide his or her Social Security number; (2) whom the Department of Revenue certifies is liable for delinquent taxes; or (3) whom the Department of Workforce Development certifies has failed to make court ordered child or family support payments.

You must enter your nine digit social security number here:

9

Lobbyist Certification

I certify that I am the lobbyist named below and that the above information is true and correct to the best of my knowledge, information, and belief.

Lobbyist Name

joe schmoe

Application Date

5/12/2017

Important: Only the actual lobbyist should certify this lobbyist license application while logged into the system using their own user account.

Certify

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Start Over
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NOTE: Lobbyists are **not licensed** until the Ethics Commission receives the lobbyist's license fee payment and eligibility is confirmed with the Department of Children and Families, the Department of Workforce Development, and Department of Revenue.

Principal Registration and Lobbyist Authorization

A "principal" is any business or organization which employs or pays a lobbyist in any capacity, whether in-house or contract. Principals registered during a previous registration need to *renew* their registration. *Please* contact the Wisconsin Ethics Commission if there are any questions about past registration information.

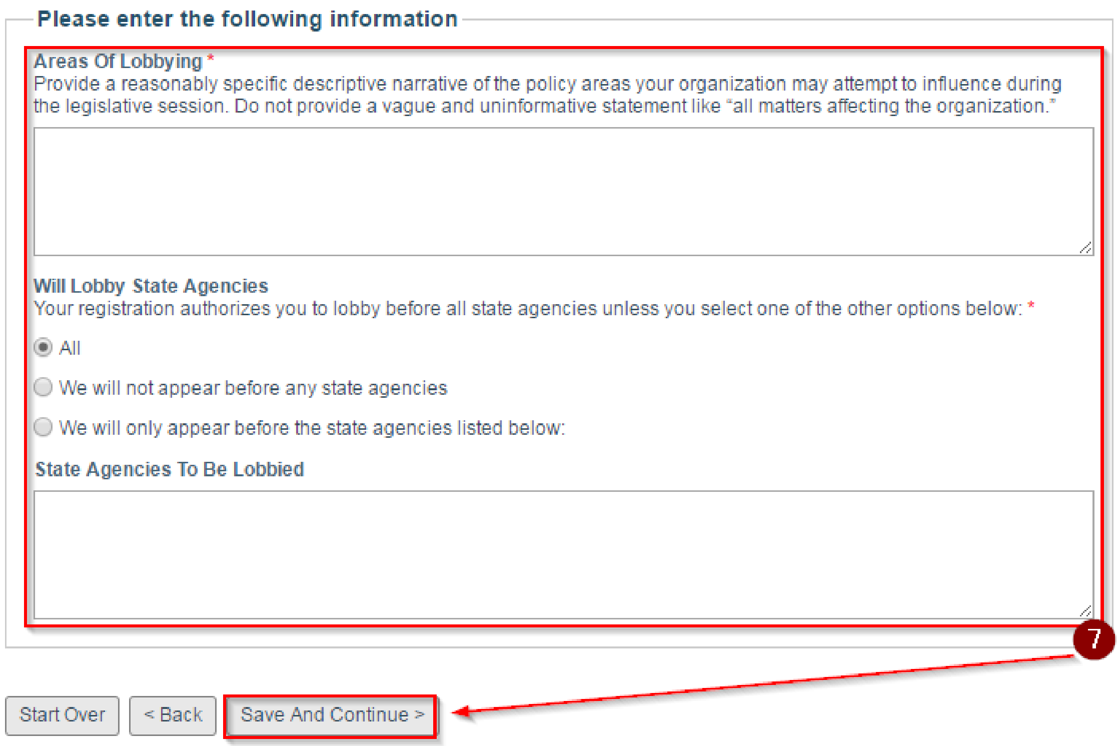
Any person who is not a principal by legal definition and does not anticipate spending $500 or more on lobbying activities may register with the Wisconsin Ethics Commission as a Limited Principal. Persons who believe they are eligible for a limited principal registration *must* contact the Ethics Commission before their application will be approved.

New Principal Registration and Lobbyist Authorization

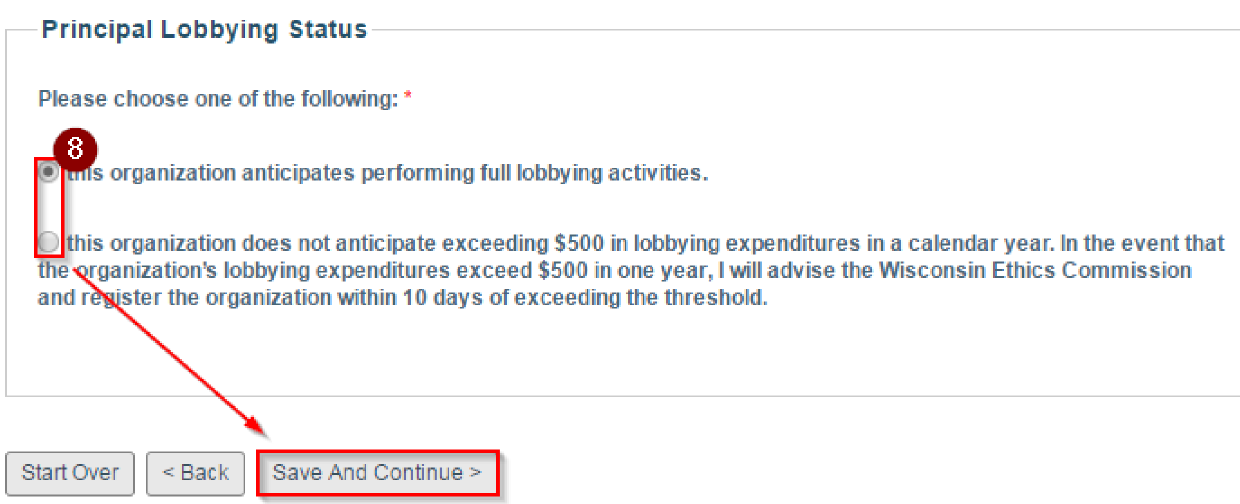
1. Log in to the user account and click **Registration and Licensing** on the left navigation bar (not pictured).
2. Click **Register a Principal** on the left navigation bar.
3. Click **Register a New Principal** in the middle of the screen.

4. Enter the principal information; all fields with an asterisk are required and click **Save and Continue** (Not pictured).
5. Select the appropriate area of interest that best suits the principal and click **Save and Continue.**

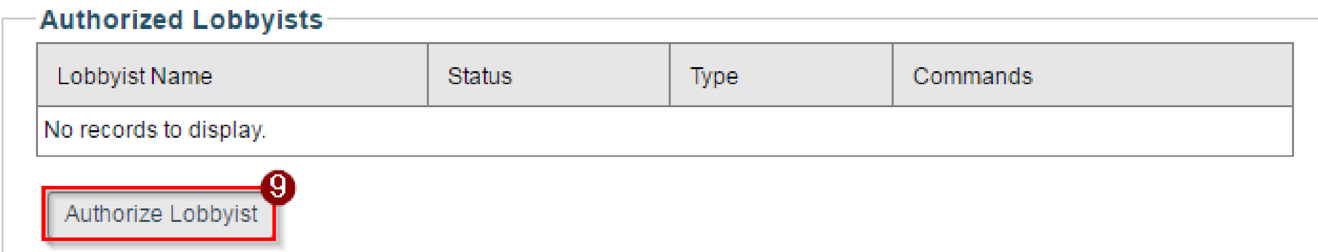
6. Enter business interests and contact information (all fields with a red asterisk are required), then click **Save and Continue** (not pictured).
7. Enter the policy areas that the organization may attempt to influence during the legislative session. Do *not* provide vague and uninformative statements such as “All matters related to the regulation of manufacturing,” instead, be as descriptive as possible. This will assist members of the public, legislative employees and others in finding the principal in searches. Please also select the appropriate response regarding whether or not the principal will be lobbying state agencies, and if so, which agencies. If you are not certain, it is recommend that you leave ‘All’ selected. Click **Save and Continue.**



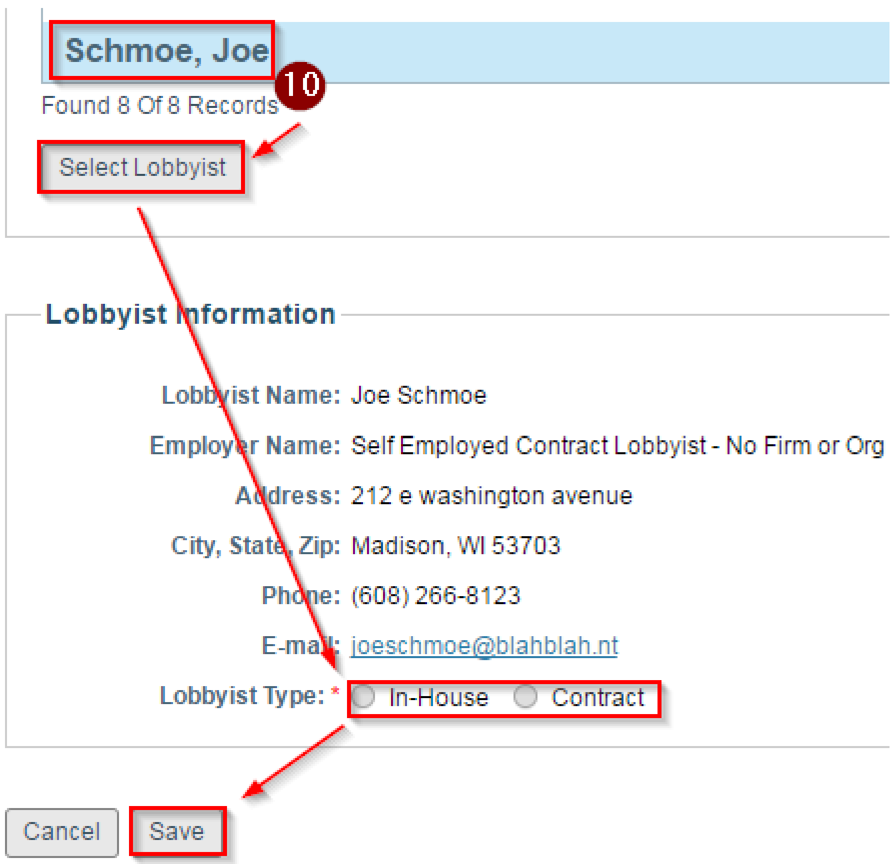
8. Designate if the principal will perform full or limited lobbying activities. Click **Save and Continue.**



9. Click **Authorize Lobbyist.**

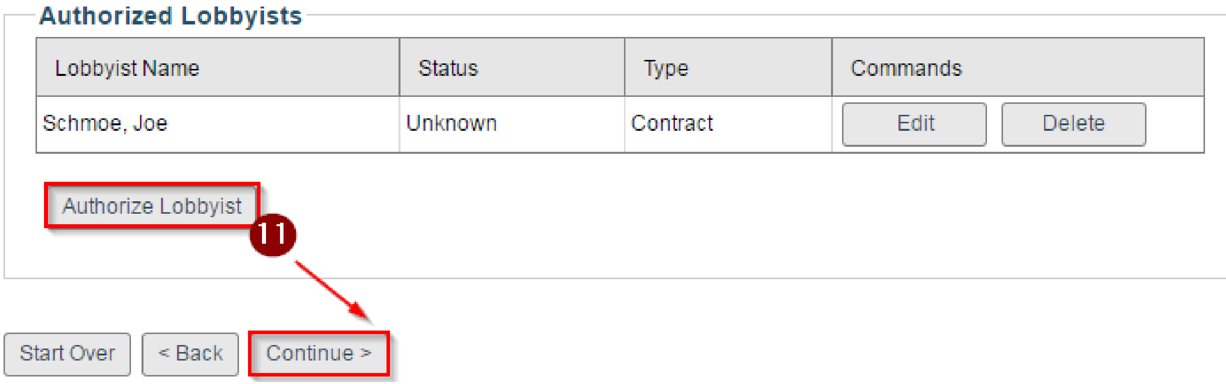


10. Type in the search field the *licensed* lobbyist's name and click **Search** (not pictured). Click on the name of the lobbyist to authorize and click **Select Lobbyist**. The 'Lobbyist Information' will autofill with the lobbyist information, please verify that this is the lobbyist to authorize. Choose if the lobbyist will be **In-House** or **Contract**. Lastly, click **Save**.

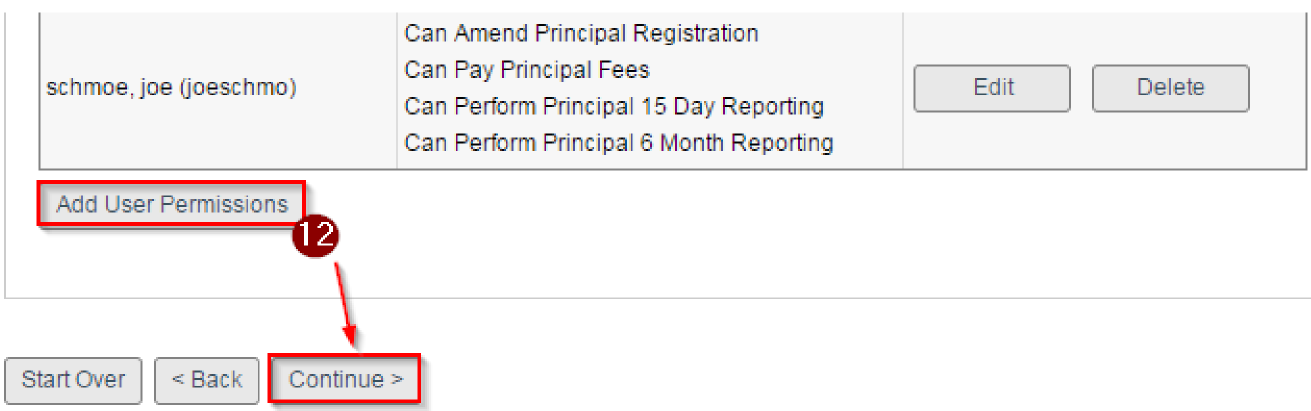


NOTE: Lobbyists **must** be licensed **before** they can be authorized to lobby for a principal. *Unlicensed lobbyists will not show up when searching, see step 10.*

11. If more lobbyists need to be authorized, click **Authorize Lobbyist** from this screen and repeat steps 9 and 10. If not, click **Continue.**



12. Verify User Permissions to this Principal's account. The principal controls which users have the ability to pay fees, submit reports and amend registration information. If other users do not need to be added at this time, click **Continue.** To add other users, click **Add User Permissions**, type the Username, click **Select User Account** and choose the permissions, then click **Save** (not pictured).



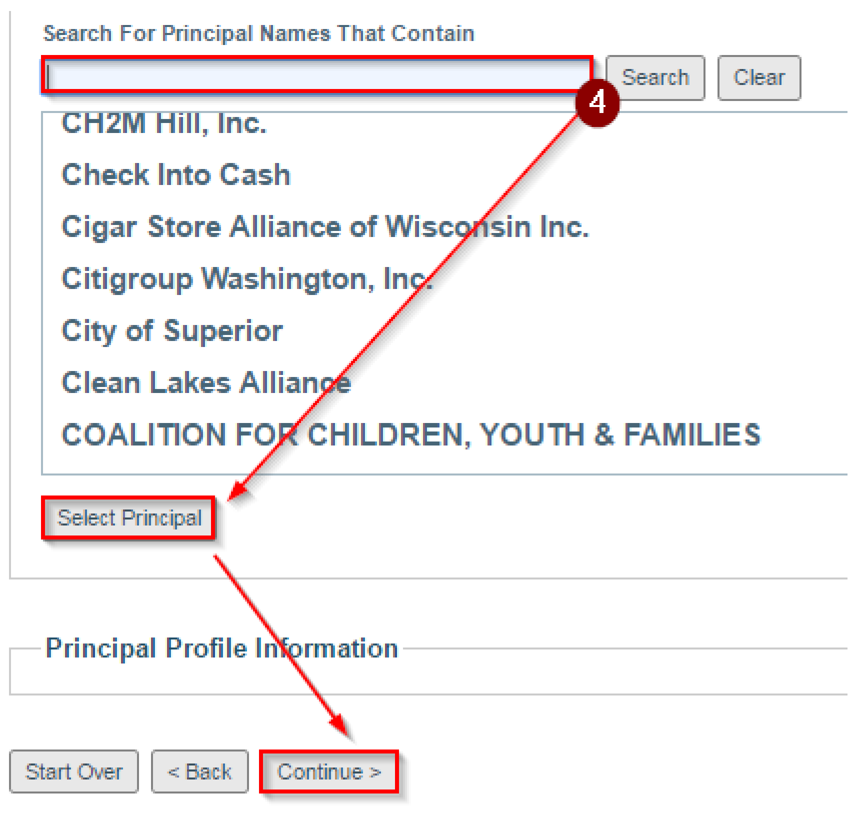
13. Verify the Principal Registration Summary for accuracy, and click **Certify** (not pictured). This will place the appropriate fees under the 'Pay Fees' tab, located on the left navigation bar of the login screen. Congratulations! The Principal can now register for or against legislative matters and complete are required lobbying reporting activities.

Re-register an Existing Principal and Lobbyist Authorization

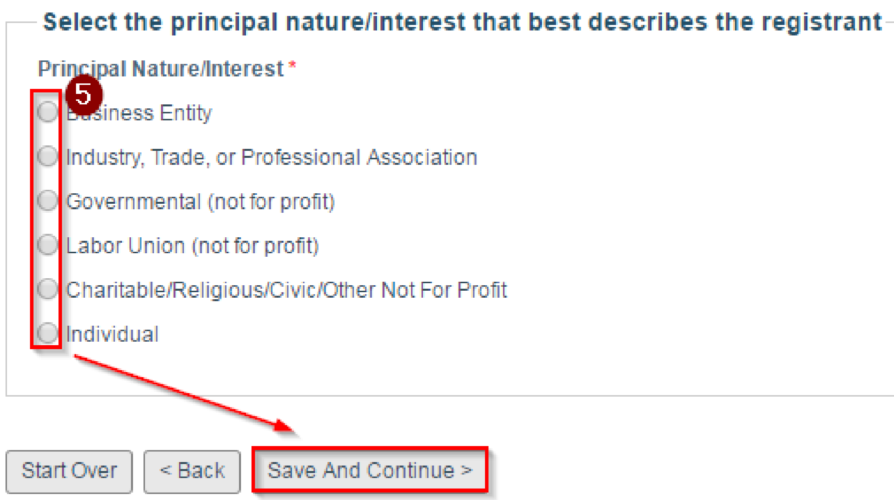
Principal registrations are valid for one legislative session and expire on December 31st of every even numbered year. Starting on December 1st of every even numbered year, the Ethics Commission accepts principal registration renewals.

1. Log in to a user account that has registration permissions for the principal and click **Registration and Licensing** on the left navigation bar (not pictured).
2. Click **Register A Principal** on the left navigation bar (not pictured).
3. Click **Re-register an Existing Principal**. Previously started applications can be accessed by choosing the application from the drop-down and clicking **Resume an Incomplete Principal Lobbying Registration**.

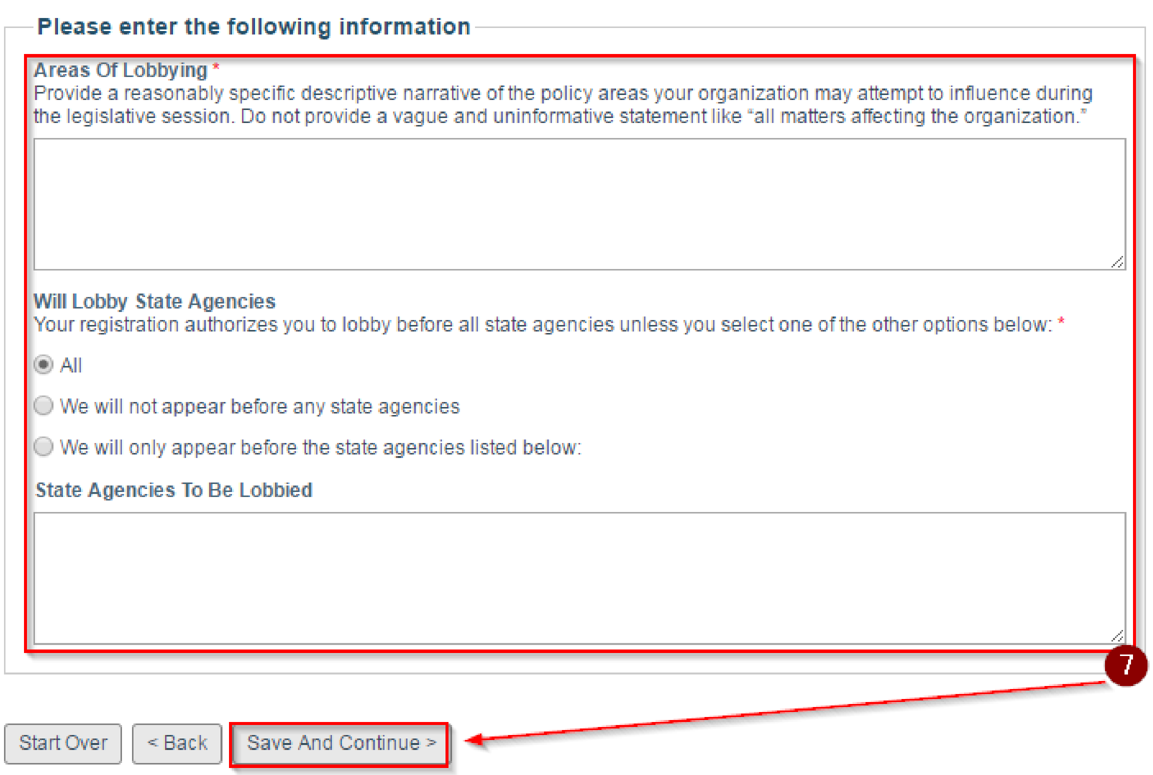
4. Type in the search field the principal to reregister and click **Search.** Click on the name of the principal and click **Select Lobbyist**. The 'Principal Profile Information' will autofill with the principal information. Finally, click **Continue**. Make any necessary updates to the principal contact information such as title, phone number, email addresses, or correspondence contact, then click **Save and Continue** (Not pictured).



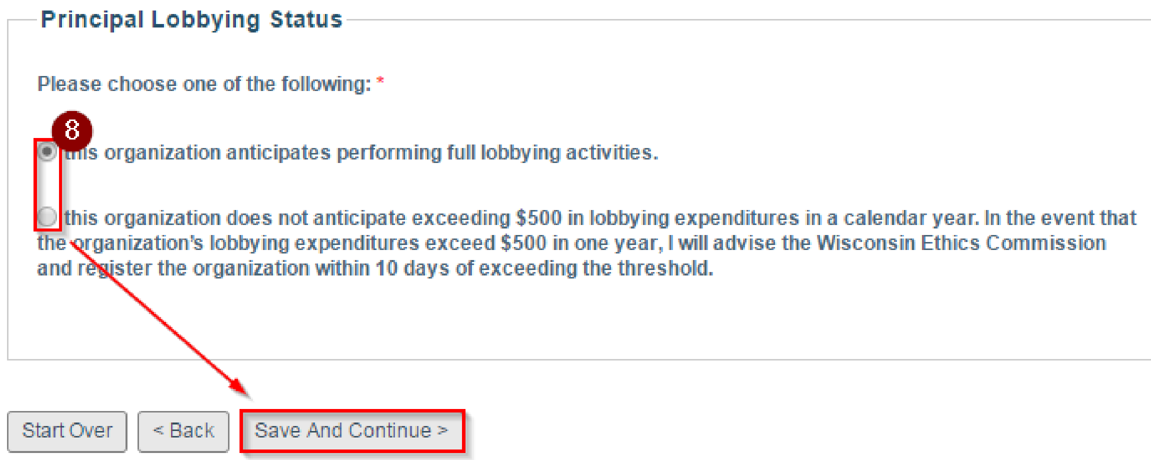
5. Select the appropriate area of interest that best suits the principal and click **Save and Continue.**



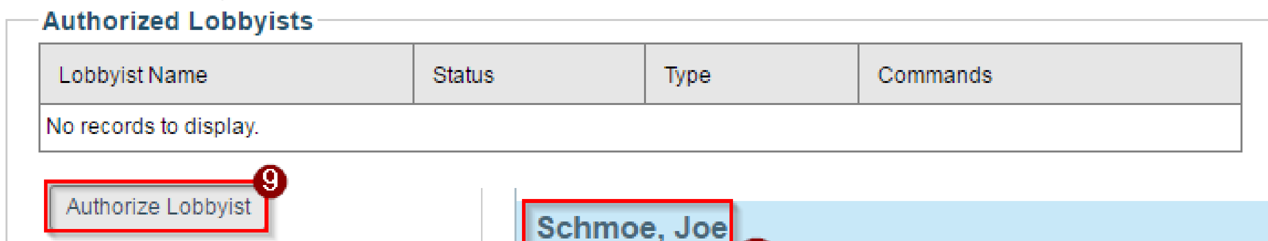
6. Enter business interests and CEO information (all fields with a red asterisk are required). Then click **Save and Continue** (not pictured).
7. Enter the policy areas that the organization may attempt to influence during the legislative session. Do *not* provide vague and uninformative statements such as "All matters related to the regulation of manufacturing," instead, be as descriptive as possible. This will assist members of the public, legislative employees and others when searching for the principal. Please also select the appropriate response regarding whether or not the principal will be lobbying state agencies, and if so, which agencies. If you are not certain, it is recommend that you leave 'All' selected. Click **Save and Continue.**



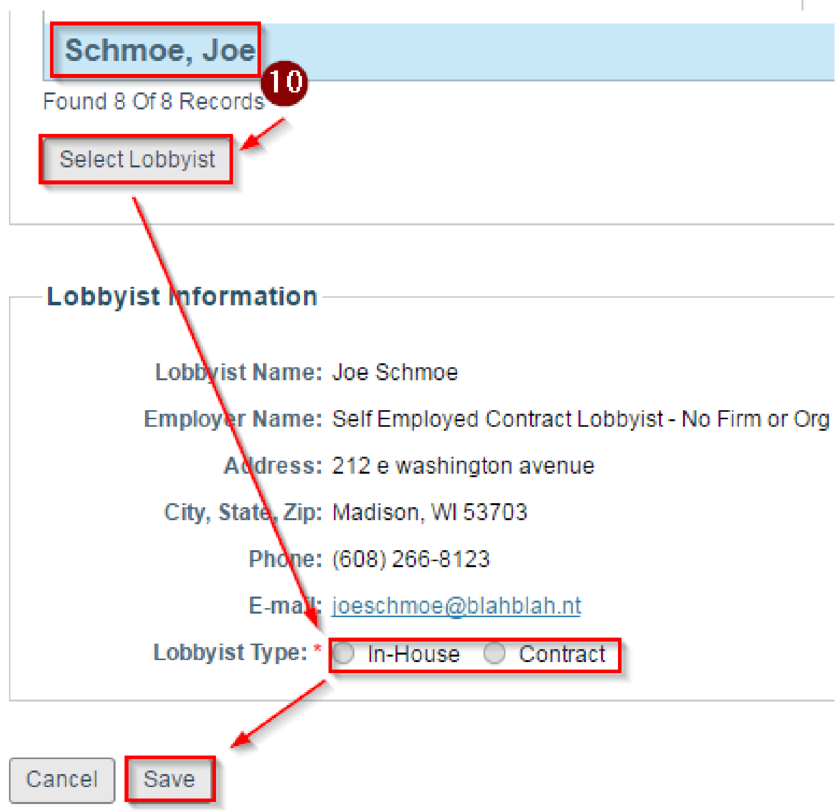
8. Designate if the principal will perform full or limited lobbying activities. Click **Save and Continue.**



9. Click **Authorize Lobbyist.**

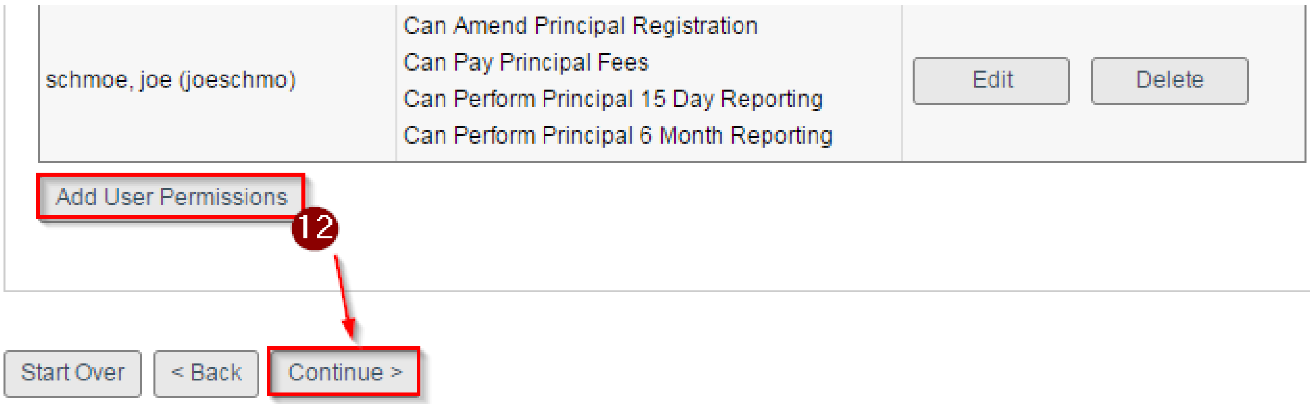


10. Type in the search field the *licensed* lobbyist's name and click **Search** (not pictured). Click on the name of the lobbyist to authorize and click **Select Lobbyist**. The 'Lobbyist Information' will autofill with the lobbyist's information. Choose if the lobbyist will be **In-House** or **Contract**. Finally, click **Save**. If more lobbyists need to be authorized click **Authorize Lobbyist** from this screen, and repeat steps 9 and 10. If not, click **Continue** (not pictured).



NOTE: Lobbyists **must** be licensed **before** they can be authorized to lobby for a principal. *Unlicensed lobbyists will not show up when searching, see step 10.*

11. Verify User Permissions to this Principal's account. The principal controls which users have the ability to pay fees, submit reports and amend registration information. If other users do not need to be added at this time, click **Continue.** To add other users, click **Add User Permissions**, type the Username, click **Select User Account** and choose the correct permissions, then click **Save** (not pictured).



12. Verify the Principal Registration Summary for accuracy, and click **Certify** (not pictured). This will place the appropriate fees under the 'Pay Fees' tab, located on the left navigation bar of the login screen. The Principal can now register for or against legislative matters and complete are required lobbying reporting activities.

Paying Fees

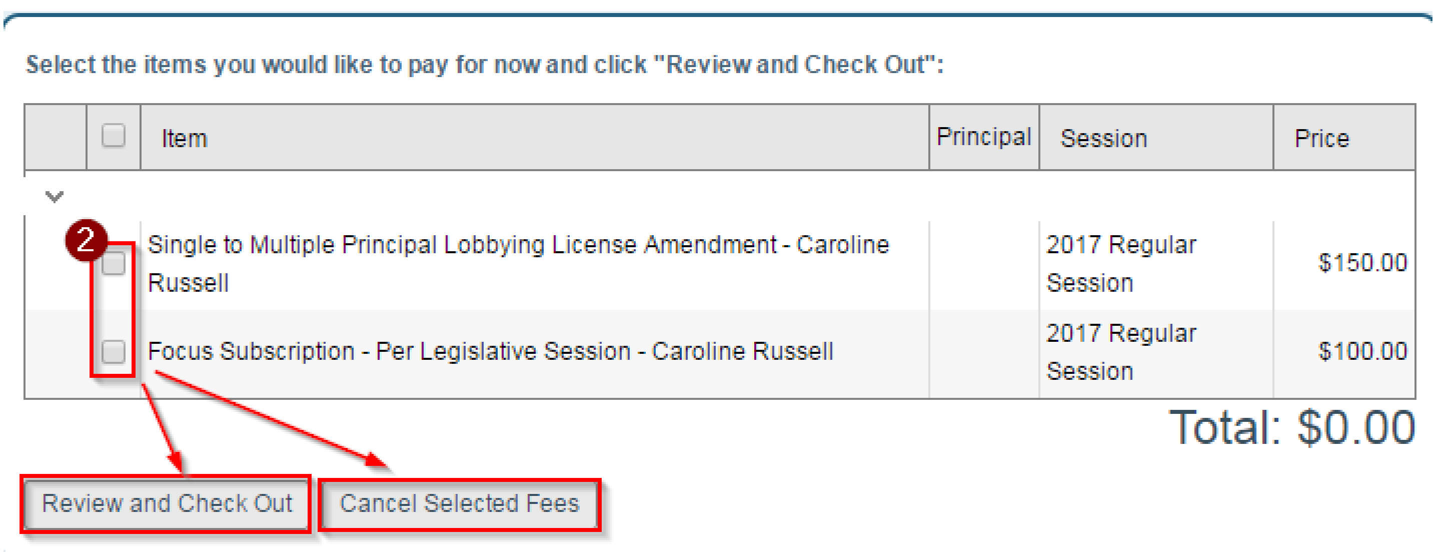
There are three steps a lobbying organization (principal) must take to remain compliant with lobbying law:

1. License the organization's lobbyist(s)
2. Register the organization, and
3. Authorize its lobbyist(s)

There are different fees for *each* of these steps. Through the registration and authorization process, fees will accrue and can be paid online with a credit card or bank account, or through mail with a check. *Fees paid with a credit card will generate a convenience fee included with the total at checkout.*

NOTE: Fees are only visible in user accounts that have been given permissions to pay fees.

1. Log in to the user account and click **Pay Fees** on the left navigation bar (not pictured). This is the "cart," which shows all of the fees accrued if an application for a lobbyist license, principal registration, lobbyist authorization, or focus subscription has been filled out.
2. Select the fees to pay by checking the box to the left of each itemized fee, then click **Review and Check Out.** From this screen fees that were added accidentally can be cancelled by selecting them and clicking **Cancel Selected Fees.** *Be careful when cancelling fees: fees only reappear when the application process has been completed again.*


Select the items you would like to pay for now and click "Review and Check Out":

	Item	Principal	Session	Price
2	Single to Multiple Principal Lobbying License Amendment - Caroline Russell		2017 Regular Session	$150.00
	Focus Subscription - Per Legislative Session - Caroline Russell		2017 Regular Session	$100.00

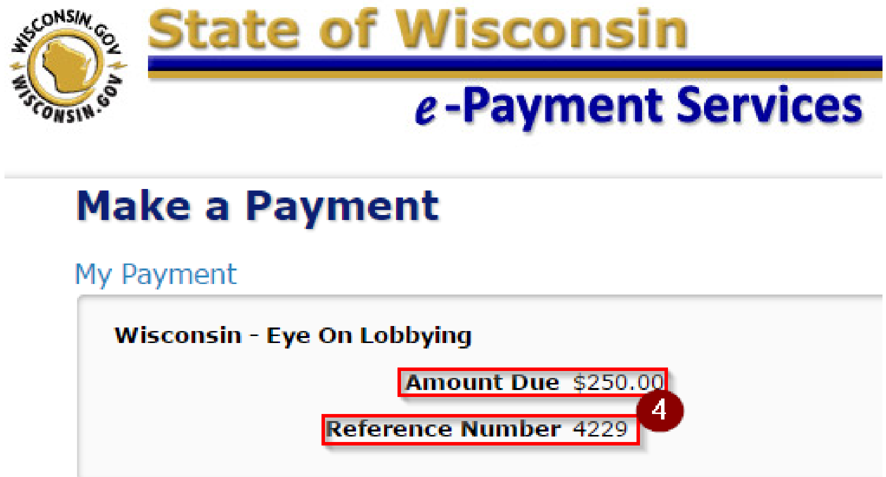
Total: $0.00

Review and Check Out

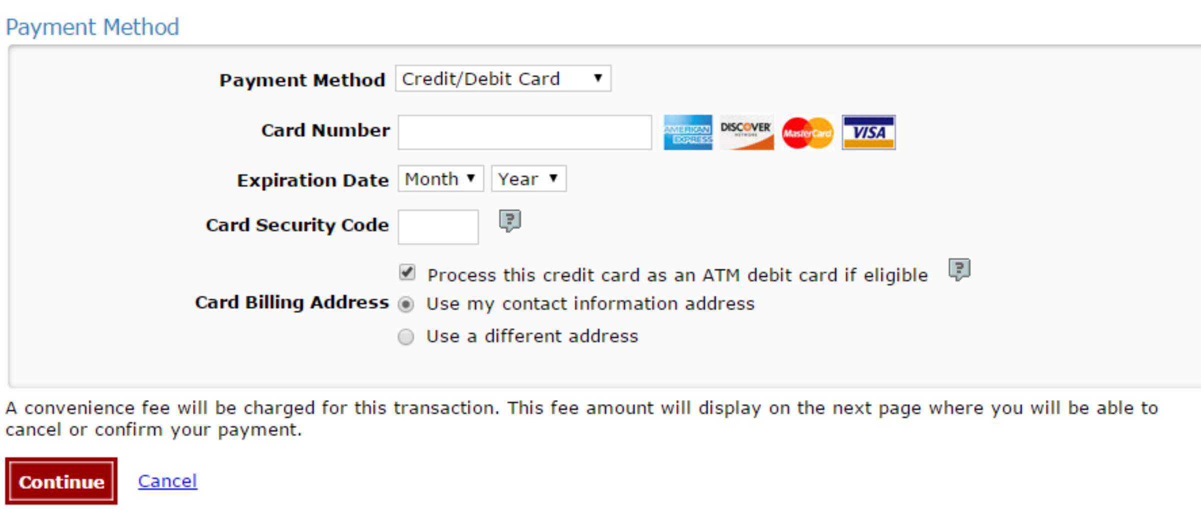
Cancel Selected Fees

3. Click **Pay Online** or **Pay with Cash or Check** (not pictured). Online payments can be made with a bank account, or a credit card with an additional convenience fee.

4. An E-payments services window will come up for *online payments*. Make sure the **amount due** is correct and save the **reference number** at the top of the screen for record keeping. Fill out the contact information and choose the payment method (not pictured).



5. Fill in credit card or bank account information and click **Continue**.



6. Verify the payment details, payment method, billing address, and contact information. Click **Confirm** (not pictured). Please keep a paper or electronic copy of the payment confirmation for records. An email notification will be sent to the email associated with the account to confirm that payment was submitted.
7. For *cash or check payments* click **Pay with Cash or Check** and a PDF invoice will pop up in an additional browser window. Download the invoice, print and return it either by mail or in-person for a check, or in-person only for cash.

Veterans – please visit the Wisconsin Department of Veterans Affairs Website to check for eligibility for a free lobbyist license.

http://dva.state.wi.us/Pages/educationEmployment/Fee-Waiver-List.aspx

15-Day Reporting

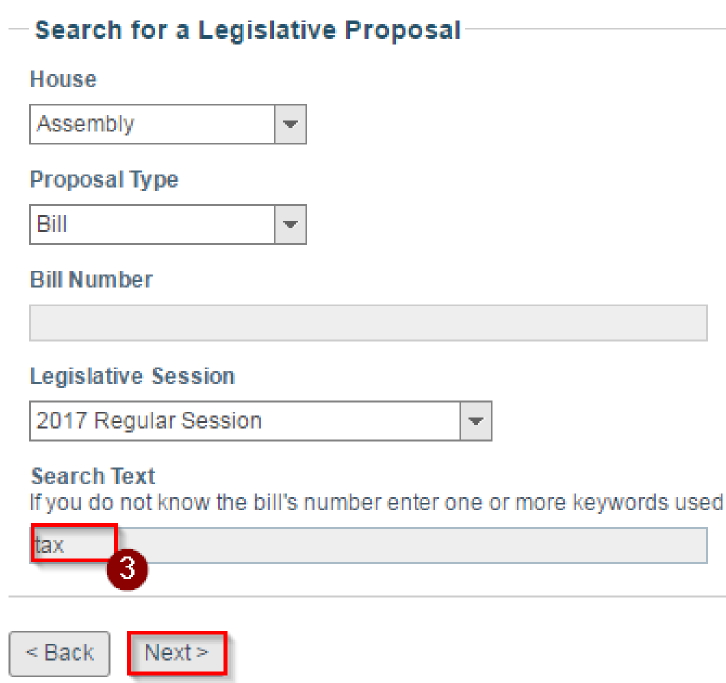
Principals must report to the Ethics Commission each bill, budget bill subject, proposed rule, and topic on which the organization makes a lobbying communication. After the first five occurrences of lobbying activity, the principal must report all activity to the Ethics Commission *within 15 days of the first lobbying communication on the bill/subject/topic/rule*. If a principal is very active, best practice is to submit a 15 day report every fifteen days. Do not wait until Statements of Lobby and Expenditures (SLAE) are due, because that deadline is more than 15 days after the deadline to submit a 15 day report and the principal will be penalized.

If a topic is going through many legislative transformations, the reporting on that topic should reflect the state of the matter at the time of communication with officials. For example: if a principal lobbies on a topic and believes it may be included in the upcoming budget proposal, the topic must be reported as a *topic* first. If the topic then is taken up in the budget bill and the principal continues to lobby on it, the topic should now be reported as a *budget bill subject,* after they are published. If the matter now a part of a *budget bill subject* is removed from the budget, but is still being lobbied on as a standalone bill, it should again be reported as a *topic.* If that *topic* is introduced as a standalone bill, lobbying activity on it must now be reported as a *legislative proposal.*

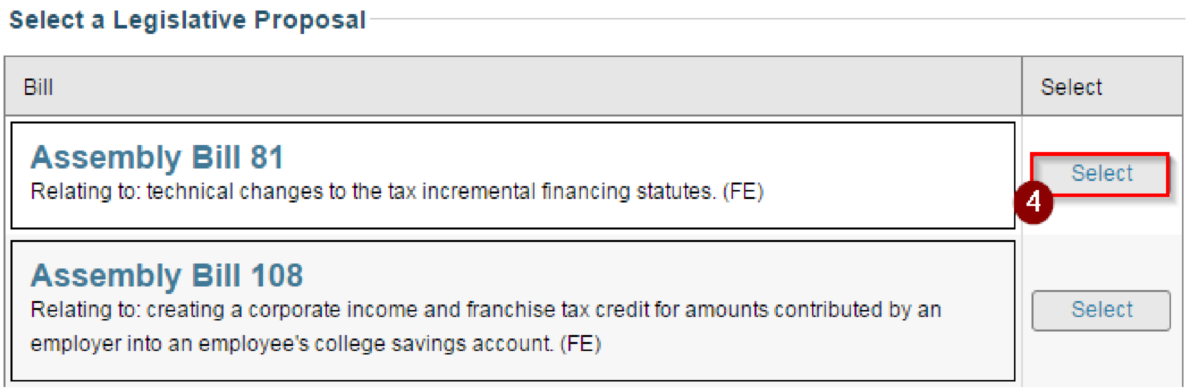
> Budget Bill Subjects are published generally within a few days of the proposal of the budget, with titles from their "relating to" clause, and may not exactly match a topic. This is not an error, but is because topic titles are determined by principals when they self-report.

Legislative Proposals

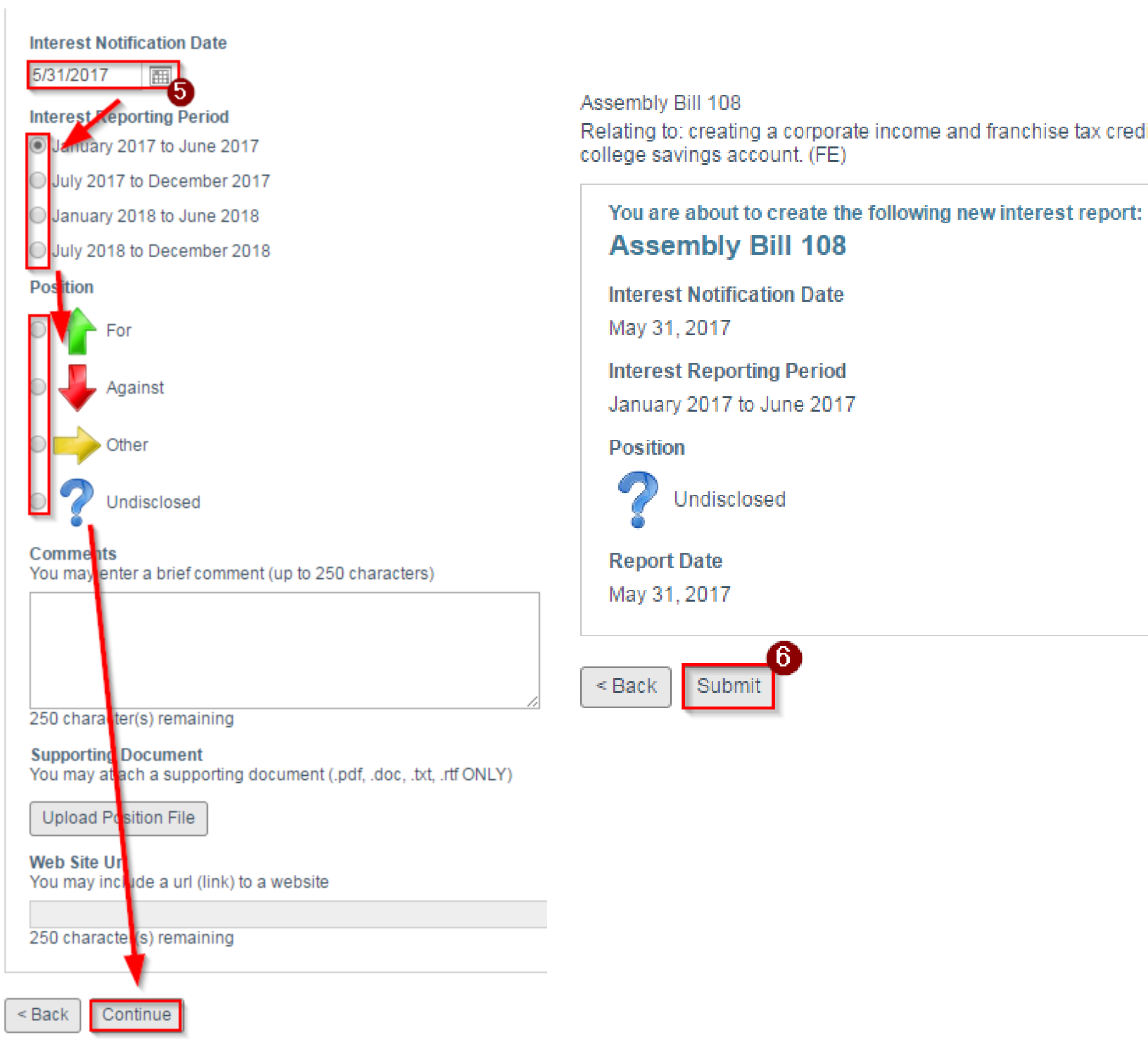
1. Log in to the user account and click **Submit 15 Day Report** on the left navigation bar (not pictured).
2. Click the appropriate option for registering an interest—which in this case is a legislative proposal. Be sure to choose the correct principal from the drop-down menu and click **Next >** (not pictured).
3. Search for the bill, joint resolution, or resolution by number or by key word in the bill's "relating to" clause (in the example, the search text is "tax." Click **Next >**.



4. Click **Select** next to the appropriate bill, joint resolution, or resolution.



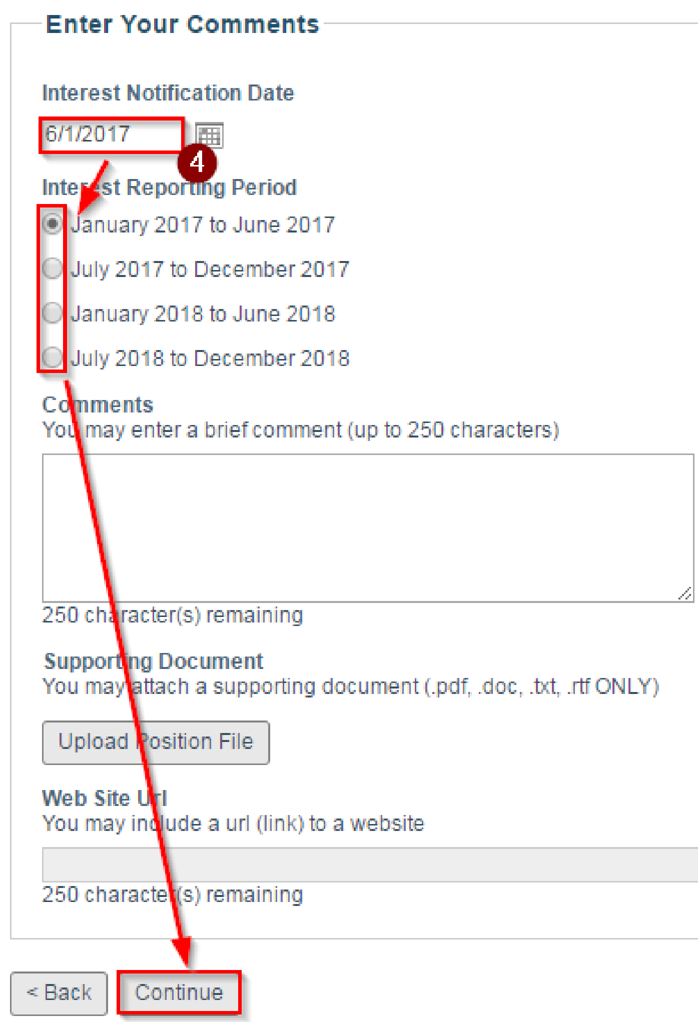
5. Be sure the *Interest Notification Date* is accurately reflects the day the lobbyist had communication on the bill. The field auto-populates with the current date if not changed. Next, ensure the *Interest Reporting Period* is accurate. Add any comments from the principal, a document such as a memo, and/or a link to a website. Click **Continue.**
6. Ensure that the information regarding the principal's position, the reporting period, and the interest notification date is correct. Click **Submit**. Eye on Lobbying will send a confirmation of the 15 day report via email.



Budget Bill Subjects

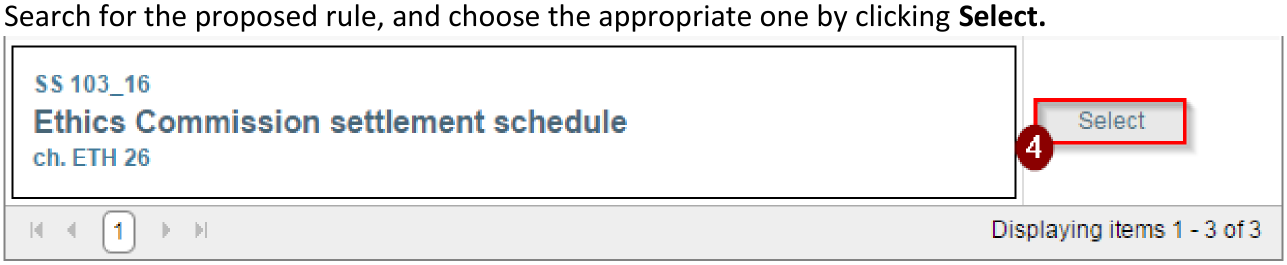
Budget bill subjects are published by the Wisconsin Ethics Commission in Eye on Lobbying within five days of publication by the Legislative References Bureau. Until budget bills subjects are published, they should be reported as topics in 15-day reports.

1. Log in to the user account and click **Submit 15 Day Report on the left navigation bar (not pictured).**
2. Click the appropriate option for what registering interest—which in this case is a Budget Bill Subject. Be sure to choose the correct principal from the drop-down menu and click **Next >** (not pictured).
3. Search for the budget bill subject from the drop-down menu, and chose the appropriate subject. Click **Next >** (not pictured).
4. Be sure the *Interest Notification Date* accurately reflects the day the lobbyist had communication on the budget bill subject. The field auto-populates with the current date if not changed. Next, ensure the *Interest Reporting Period* is accurate. Add comments from the principal, a document such as a memo, and/or link to a website. Click **Continue.**
5. Ensure that the information regarding the budget bill subject and the interest notification date are correct. Click **Submit** (not pictured). Eye on Lobbying will send a confirmation of the 15 day report via email.

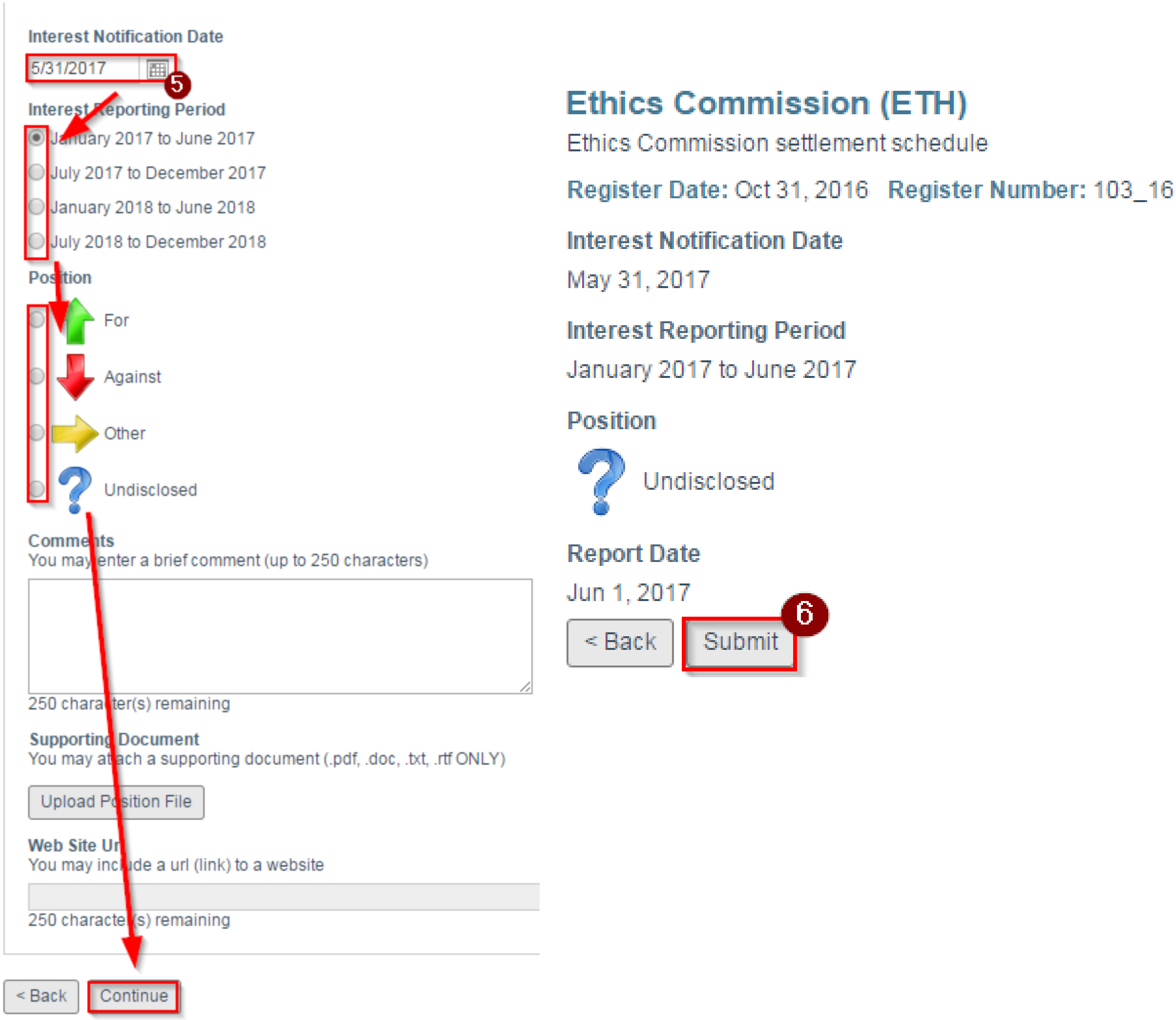


Proposed Rules (Rule-Making Proceeding)

1. Log in to the account and click **Submit 15 Day Report on the left navigation bar (not pictured).**
2. Click the appropriate option for registering interest—which in this case is a Proposed Rule. Be sure to choose the correct principal from the drop-down menu and click **Next >** (not pictured).
3. Search for the agency that is proposing the rule from the drop-down menu, and choose the appropriate agency. Click **Next >** (not pictured).
4. Search for the proposed rule, and choose the appropriate one by clicking **Select.**



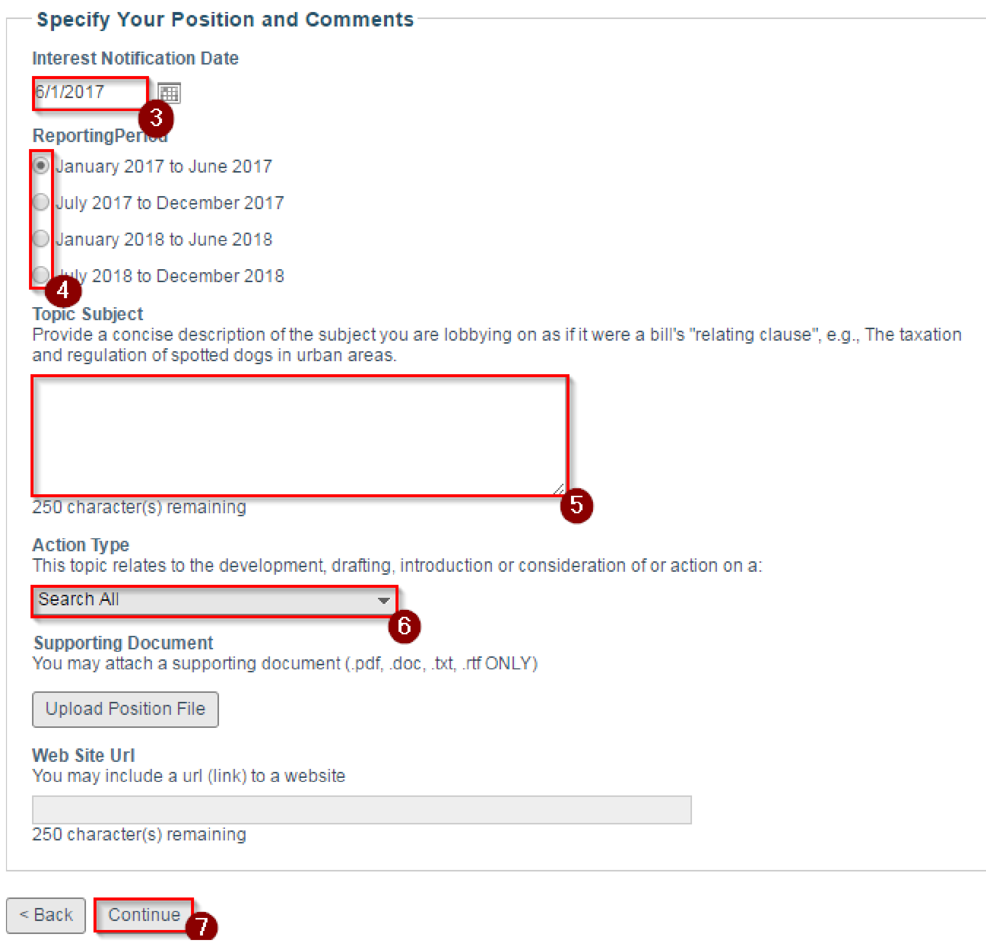
5. Be sure the *Interest Notification Date* accurately reflects the day the lobbyist had communication on the proposed rule. The field auto-populates with the current date if it is not changed. Next, ensure the *Interest Reporting Period* is accurate. Then choose the principal's position on the proposed rule. Add comments from the principal, a document such as a memo, and/or a link to a website. Click **Continue.**
6. Ensure that the information regarding the principal's position, the reporting period, and the interest notification date is correct. Click **Submit**. Eye on Lobbying will send a confirmation of the interest via email.



Topics

1. Log in to the user account and click **Submit 15 Day Report on the left navigation bar (not pictured).**
2. Click the appropriate option to register interest in—which in this case is a Topic. Be sure to choose the correct principal from the drop-down menu and click **Next >** (not pictured).

3. Enter the correct *Interest Notification Date*. The field auto-populates with the current date if it is not changed.
4. Choose the correct *Interest Reporting Period*.
5. Enter the *Topic Subject*. This should be a very concise description of the topic that was discussed and should be similar to a bill's "relating to" clause.
6. Choose the type of action that this topic relates to. This can be thought of as the goal of the communication. Upload a file documenting the principal's position or a website.
7. Click **Continue**.
8. Ensure that the information regarding the principal's position, the reporting period, and the interest notification date is correct. Click **Submit** (not pictured)Eye on Lobbying will send a confirmation of the 15 day report via email.



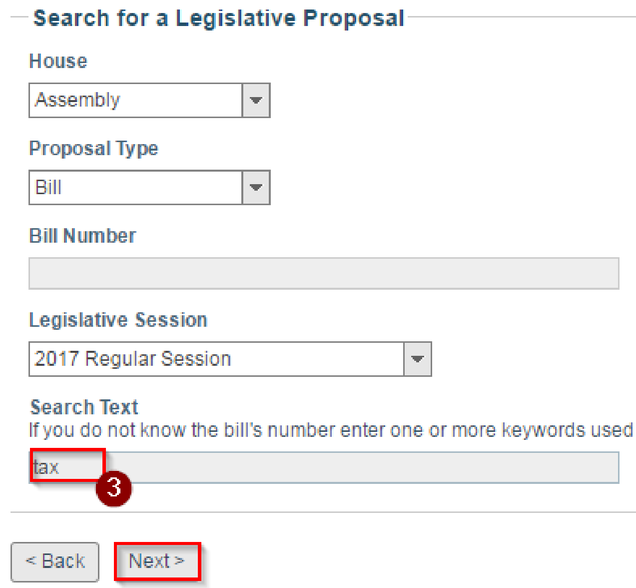
NOTE: Do **not** use "All matters relating to X" as a topic. Topics must be specific, and should be similar to a bill's "relating to clause". If you have questions about what to title a topic, please contact the Ethics Commission.

Do **not** describe the communication that took place (e.g., "Spoke with Rep. X's office about the possible effects Y could have on Z and set up another meeting). Be as *informative* as possible while remaining *succinct*.

Amending a 15-Day Report

If information in a previous 15-Day Report was entered incorrectly, or the principal or lobbyist would like to change any information in the 15-Day Report or delete the interest, they can do so by *amending that report.*

1. Log in to the user account and click **Submit 15 Day Report** on the left navigation bar (not pictured).
2. Click the appropriate option for amending—legislative proposal, budget bill subject, proposed rule, or topic. Be sure to choose the correct principal from the drop-down menu and click **Next >** (not pictured).
3. Choose the appropriate search criteria for the legislative proposal, budget bill subject, proposed rule, or topic to amend. Then click **Next >**.



4. Be sure that the interest is the correct one to amend, and click **Edit** or **Delete** (not pictured). The Eye On Lobbying application will only allow you to delete a 15-day report within 24 hours of first reporting it. If you need to delete a report after the initial 24 hours, please contact the Ethics Commission.
5. Change information as necessary and click **Update**.
6. Ensure that all information is correct. Click **Submit**. Eye on Lobbying will send a confirmation of the change via email (not pictured).

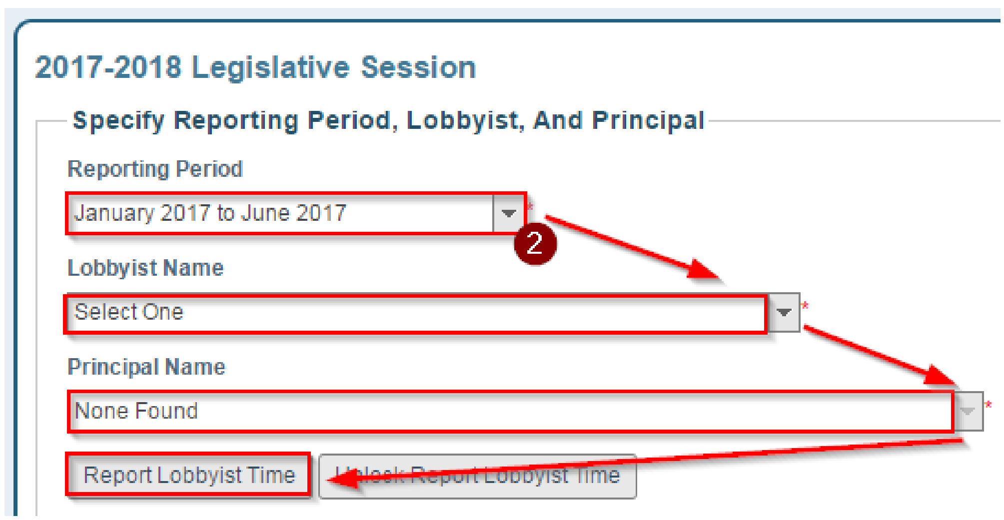
NOTE: Please refrain from amending reports more than necessary. If you are experiencing issues with how to report or find yourself consistently amending information, please contact the Ethics Commission.

Statements of Lobbying Activities and Expenditures (SLAEs)

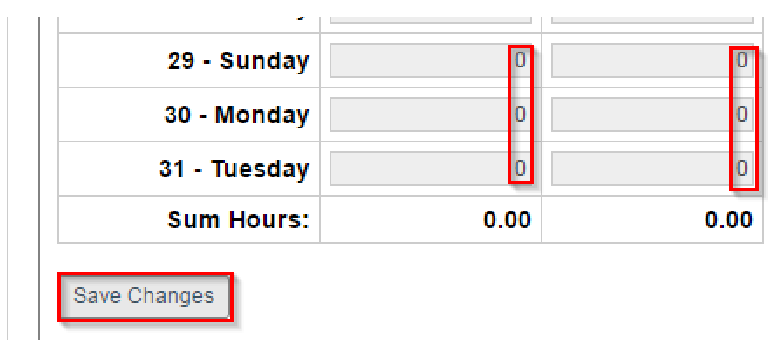
Each registered lobbying principal must complete a Statement of Lobbying Activity and Expenditures (SLAE) every six months of the two-year legislative session. There are five steps to complete a SLAE, which are outlined in the following subsections.

Lobbyist Time Report

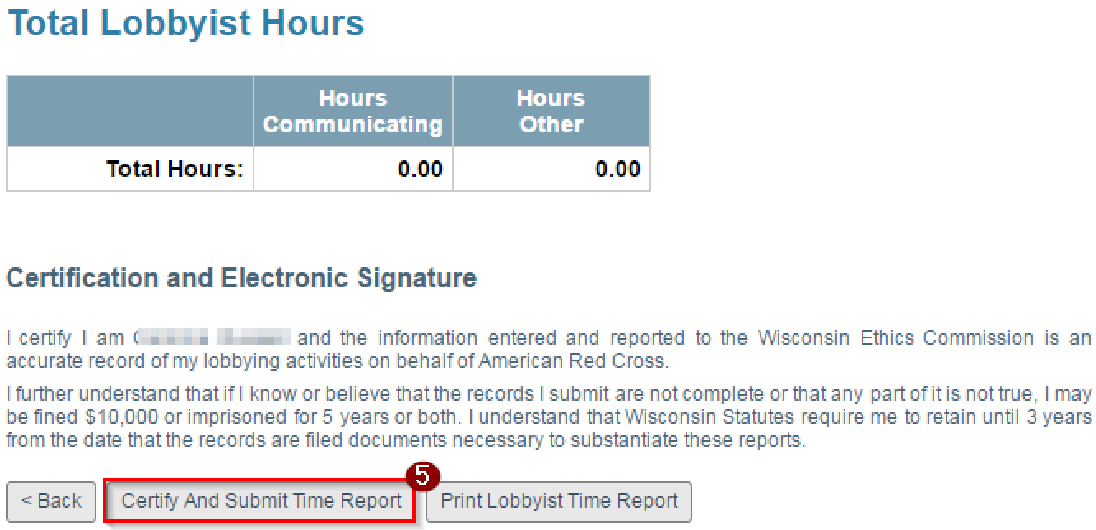
1. Log into the user account and click **Enter Lobbyist Hours** on the left navigation bar. This screen can also be accessed by clicking **Submit 6 Month Report** then **Enter Lobbyist Hours** (not pictured).
2. Choose the reporting period, lobbyist, and principal and click **Report Lobbyist Time**.



3. Choose the correct month by clicking the date (not pictured).
4. Enter information for each day of that month, making sure to differentiate between direct communication and "other," such as preparation for a meeting, or a phone call. Click **Save Changes**. Do not proceed to the next month without saving changes. There is no limit to how frequently hours can be submitted.



5. When submitting the SLAE at the end of the six month reporting period, verify that the total hours are is correct and click **Certify and Submit Time Report**. If submitting the SLAE, continue on to **Non-Lobbyist Time Report**.



Non-Lobbyist Time Report

Non-Lobbyist Time to be recorded is time that governmental affairs directors, senior managers, non-clerical employees (other than Lobbyists), and others who act under the organization's supervision or direction spent on lobbying-related activities. Do not record the time of Lobbyist(s); that time is already reported in each Lobbyist's Time Report.

This time report must accurately reflect a daily accounting of time the organization spends on lobbying-related activities. There are a number of ways the organization can have individuals account for time spent on lobbying-related activities. Use any reasonable method that helps accurately record time spent on lobbying-related activities.

Lobbying-related activities include:

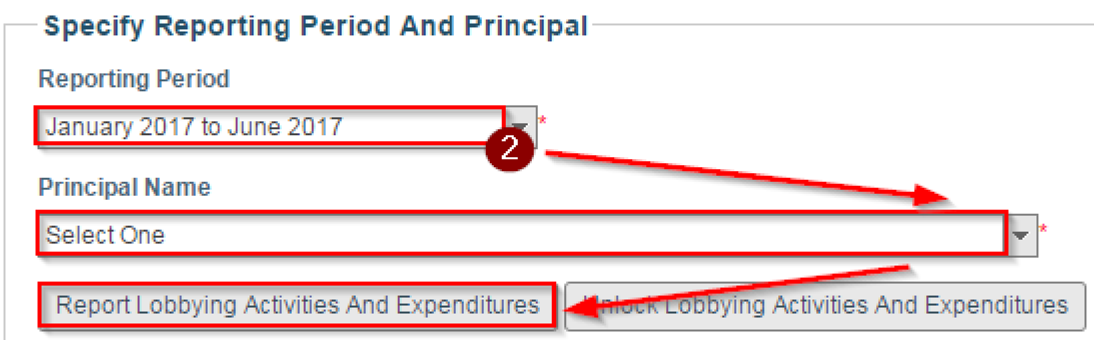
- Efforts pertaining to the development, drafting, introduction, consideration, modification, adoption, rejection, review, enactment, or defeat of any bill, resolution, amendment, report, nomination, administrative rule or other matter by either house of the legislature.
- Efforts pertaining to the proposal, drafting, development, consideration, promulgation, amendment, repeal, or rejection by any agency of a rule.
- Communication, which includes talking (in person or by telephone) and meeting with elected officials, legislative employees, agency officials, and other state employees with decision-making authority for legislative or administrative action, as well as speaking at public hearings. This category does not include letter-writing.
- Other lobbying-related activities

This category includes time spent monitoring legislative and state agency activities; writing letters; meeting with members or employees of the organization, colleagues, and others to discuss lobbying issues and strategy; collecting, compiling, or analyzing facts, data, or other information; preparing to communicate with elected officials, legislative employees, agency officials, and other state employees with decision-making authority for legislative or administrative action; preparing correspondence; and preparing others to lobby.

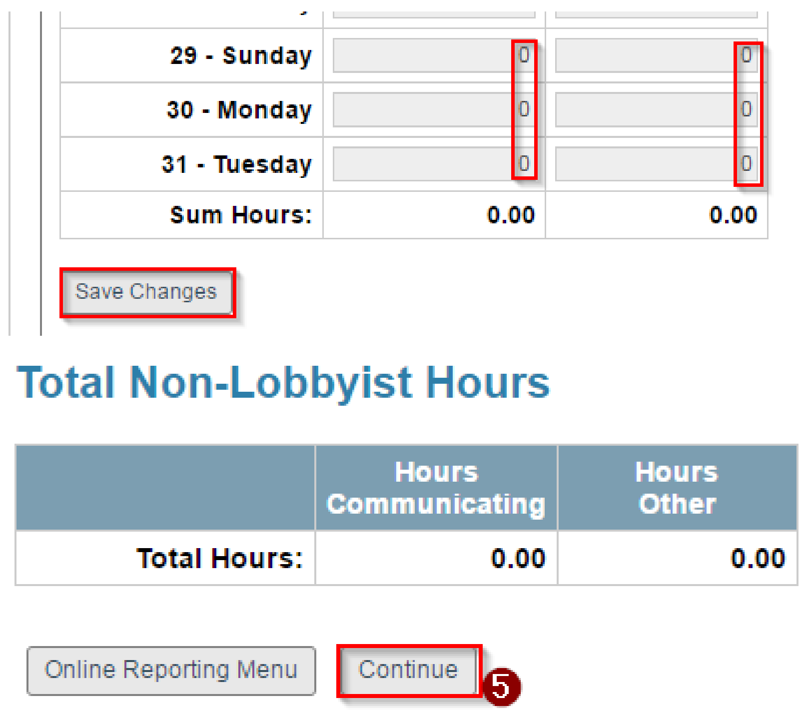
DO NOT record time spent:

- by the organization's licensed Lobbyist(s). That time should be recorded in each Lobbyist's Time Report.
- by clerical staff.
- by unpaid volunteers.
- by employees who have spent no more than 10 hours in lobbying-related activities.
- furnishing information in response to the request of an agency official (but include time furnishing information requested by legislators or legislative employees).
- traveling that does not include any lobbying-related activity.

1. Log into the user account and click **Enter Reports For Principals** on the left navigation bar. This screen can also be accessed by clicking **Submit 6 Month Report** then **Reports For Principals** (not pictured).
2. Choose the reporting period and principal, and click **Report Lobbying Activities and Expenditures**.



3. Click **2. Non-Lobbyist Time Report** (not pictured).
4. Enter information for each day of that month, making sure to differentiate between direct communication and "other," such as preparation for a meeting, or a phone call. Click **Save Changes**. Do not proceed to the next month without saving changes. There is no limit to how frequently hours can be submitted.
5. Once all non-lobbyist time has been entered for the reporting period, verify the Total Non-Lobbyist Hours and click **Continue. This** will bring up the **Time and Expenditure Summary** page.



Time and Expenditure Summary

Hours:

For each Lobbyist, hours will automatically be transferred to the organization's report once the Lobbyist has "certified" the Lobbyist's time report.

Dollars:

For contract Lobbyists, enter payments and obligations the organization made or incurred during the reporting period to each contract Lobbyist for lobbying and lobbying-related activities (including retainers, fees, other compensation, and reimbursement of expenses that were charged separately). If two or more contract Lobbyists were retained from the same lobbying firm and are unable to allocate the portion of the total lobbying payment attributable to each, payment to the lobbying firm can be listed instead of to an individual Lobbyist.

For in-house Lobbyists, enter the portion of salaries the organization paid each officer-director and employee-lobbyist for lobbying-related activities during the reporting period.

If the organization compensated a Lobbyist, and the combined payments for lobbying represent 85% or more of the individual's total compensation, the entire amount of compensation paid to the lobbyist can be reported.

Section B: Non-lobbyist Employees: Hours, Compensation and Reimbursement

Hours: Hours will automatically be transferred from the daily itemized non-lobbyist time report to Section B.

Dollars: Enter the portion of salaries attributable to lobbying-related activities.

When making the computation disregard payments to an employee who devoted no more than 10 hours to lobbying-related activities during the reporting period. If the organization compensates an employee, and the combined payments for lobbying represent 85% or more of the individual's compensation, the entire amount of the compensation paid to the employee can be reported. Include salaries earned but not yet paid. Do not report amounts reported in a prior period.

Section C: Public Relations, Research, Volunteers' Expenses and Other Lobbying Costs

Identify all lobbying expenses and obligations the organization made or incurred during the reporting period not already reported and not included in overhead. Do not include fees paid to the Ethics Commission. Do not include in-house costs.

<u>Include the following items:</u>

- Contract Research. Payments and obligations for conducting, compiling, or preparing research, information, statistics, or analyses that would not have been incurred but for lobbying and costs of providing it to state officials.
- Research undertaken and used solely for lobbying. Report total amount of expenditures if research is used within 3 years of completion.

- Research undertaken for lobbying and used for additional purposes. Report only that portion of expenditures allocated for lobbying research (if used within 3 years of completing the research).
- Research undertaken for non-lobbying purposes and used in lobbying. Do not report an expenditure for research that would have been undertaken regardless of its use in lobbying.
- Public Relations. Costs for advertising and activities to urge the public to attempt to influence state legislation or administrative rules (if payments and obligations exceed $500 for the reporting period).
- Volunteers' Expenses. Costs of persuading and assisting members or volunteers to attempt to influence state legislation or administrative rules and reimbursements of members and volunteers for activities that pertained to lobbying. Exclude travel-related expenses already reported for lobbyists and non-lobbyist employees.

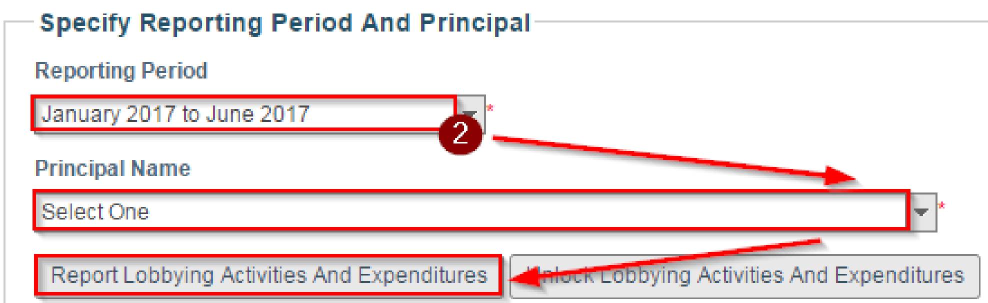
Section D: Non-lobbyist employees who devoted time to lobbying communications

List the names of the organization's paid employees who, although not Lobbyists, spoke in person or by phone or wrote to a legislator, legislative employee, or agency official during the reporting period in order to influence legislative action or administrative rulemaking.

Section E: Payment or Reimbursement to Officials

If the organization or its lobbyist paid or reimbursed an elected state official, state agency official, legislative employee, or candidate for elective state office, provide the date, the name of the recipient, and the amount of each payment. The organization is responsible for obtaining this information from its lobbyists and reporting it. Note that many state officials report to the Ethics Commission their receipt of payments exceeding $50.

1. Log into the user account and click **Enter Reports For Principals** on the left navigation bar. This screen can also be accessed by clicking **Submit 6 Month Report** then **Reports For Principals** (not pictured).
2. Choose the reporting period and principal, and click **Report Lobbying Activities and Expenditures**.



3. Click **3. Time And Expenditure Summary** (not pictured).

4. Enter all expenditure information in the corresponding drop-down menus. Save changes before moving on to another drop-down menu. Click **Continue**, which will bring up to
5.
6. **Allocation of Lobbying** Effort**.**

Allocation of Lobbying Effort

Under Wisconsin's lobbying law, every organization that employs a Lobbyist identifies to the Ethics Commission matters on which they make lobbying communications (15-Day Reports). These communications may concern a bill, budget bill subject, proposed administrative rule, or a topic not assigned a bill or clearinghouse rule number. For each matter they reported on a 15-Day Report, the organization is to provide a reasonable estimate of the percentage of the organization's total lobbying-related time during the reporting period that is associated with that item.

NOTE: Matters reported in your SLAE that should have been reported earlier due to 15-Day reporting requirements may result in a late filing penalty. You will need to enter those matters as 15-Day Reports in order to include them in your SLAE.

When estimating the portion of the organization's lobbying-related time associated with an item, account for development, planning, research, in-house discussions, and communications with state officials and staff. If pertinent, include time spent developing or seeking introduction of a proposal and time that may have been spent prior to the organization's identification of an item. Account for the reported time of all Lobbyists as well as all time reported for non-lobbyist officers, directors, and employees. Express time as a whole percent from 1 to 100.

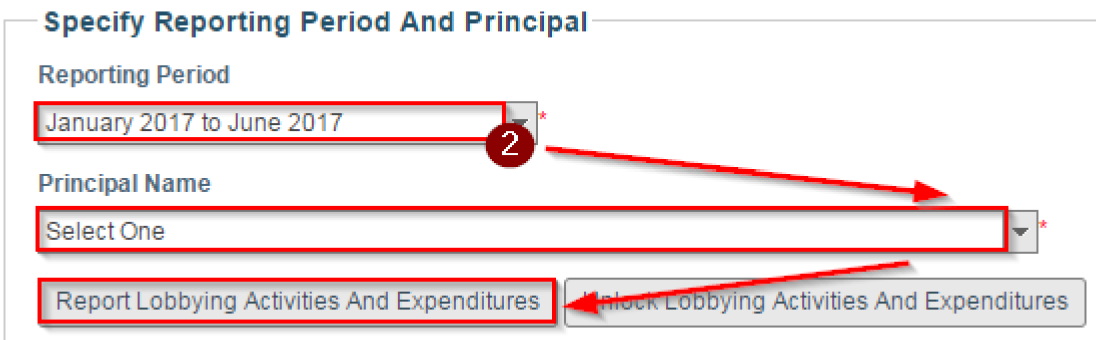
When estimating the portion of the organization's lobbying-related time associated with an item, treat each budget bill subject as a separate item. If the organization lobbied on two or more related items, use best judgment in assigning a reasonable estimate of the percentage of lobbying-related time associated with each item as a whole percent from 1 to 100.

Minor Efforts
If it is estimated that the organization spent less than 10% of its lobbying-related time on a specific bill, proposed rule, budget bill subject, or topic, the organization may choose to record that estimate next to the item as described above. The organization may also choose to record one or more matters under "Minor lobbying efforts," which documents the amount of time the organization spent on minor items which accounted for less than 10% of the organization's total lobbying-related time.

No Lobbying Communication

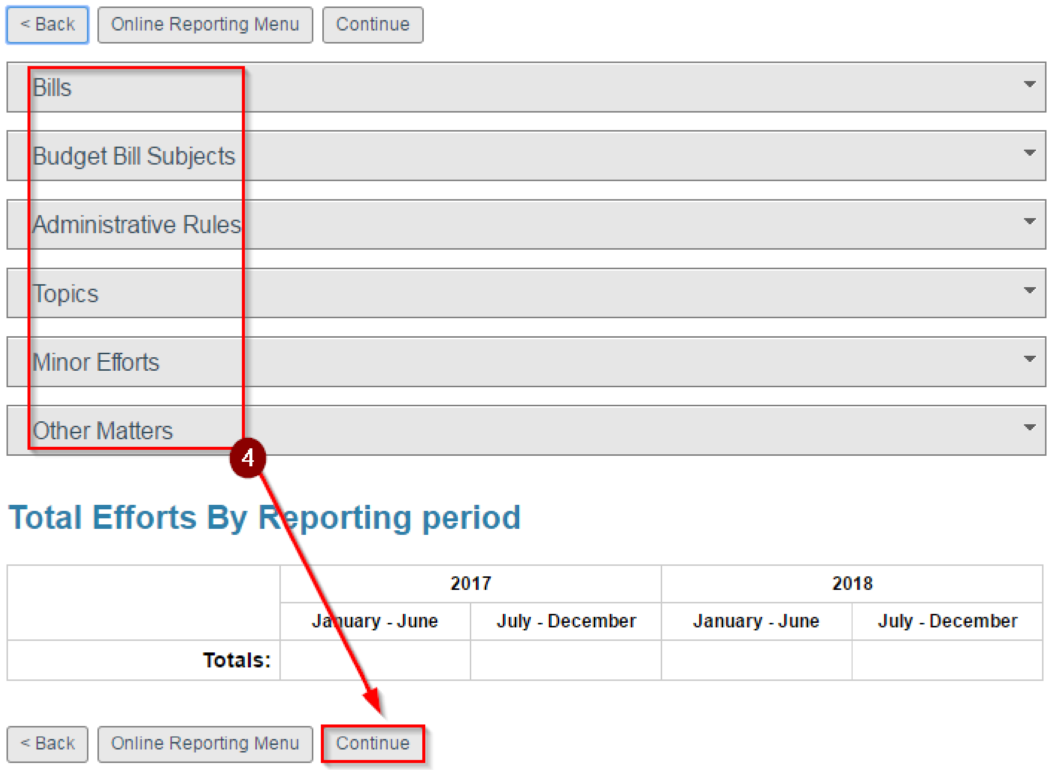
If the organization directed a portion of its total lobbying-related time toward matters on which the organization made no lobbying communication, record an estimate of the percentage of lobbying-related time the organization spent on those matters during this reporting period. Time estimates must total 100%.

1. Log into the user account and click **Enter Reports For Principals** on the left navigation bar. This screen can also be accessed by clicking **Submit 6 Month Report** then **Reports For Principals** (not pictured).
2. Choose the reporting period and principal, and click **Report Lobbying Activities and Expenditures**.



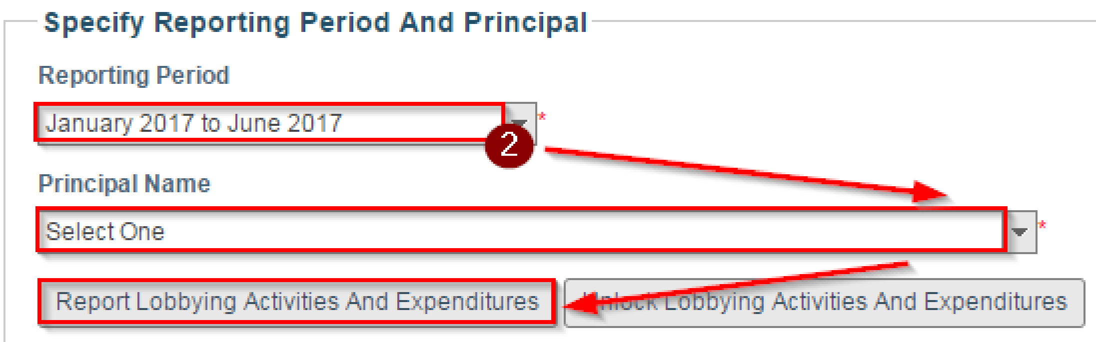
3. Click **4. Allocation of Lobbying Effort** (not pictured).
4. Enter interest in bills, subjects, rules, and topics *that have not already been submitted in a 15-Day Report*. Save changes before moving to another drop-down. One all efforts have been entered, verify the totals at the bottom of the page and click **Continue** which will bring up

5. **Verification of Totals and** Certification.



Verification of Totals and Certification

1. Log into the user account and click **Enter Reports For Principals** on the left navigation bar. This screen can also be accessed by clicking **Submit 6 Month Report** then **Reports For Principals** (not pictured).
2. Choose the reporting period and principal, and click **Report Lobbying Activities and Expenditures**.



3. Click **5. Verification of Totals and Certification** (not pictured).
4. Review all of the information displayed on the screen for validity.
5. To manually calculate fringe benefits and overhead costs, click **Calculate Fringe and Overhead**. If not, leave the default values that have auto-filled (not pictured).
6. Do not certify the report until all time, expenditures and effort have been entered for the reporting period. Click **Certify and Submit to the Ethics Commission** (not pictured). Retain a copy of the SLAE for 3 years from its due date.

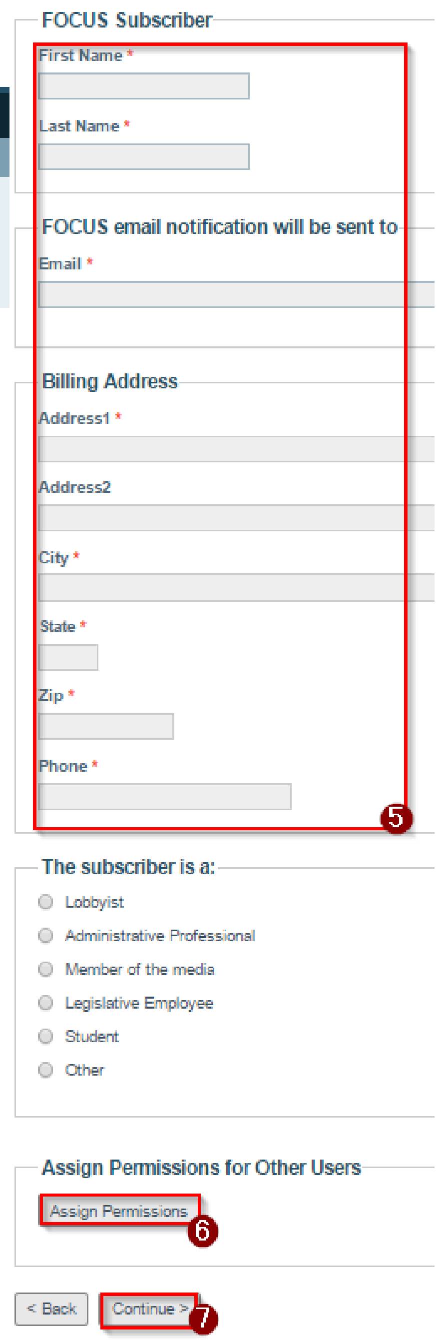
FOCUS

FOCUS is a subscription notification service managed by the Ethics Commission that provides a daily email summary of activities related to a user's lobbying interests. One subscription lasts for an entire 2-year legislative session, including special and extraordinary sessions, and only costs $100 per email address. *FOCUS* allows you to choose to receive notifications based on keywords, statute chapters and sections, bills, budget bill subjects, administrative rules, and principals.

Subscribe to *FOCUS*

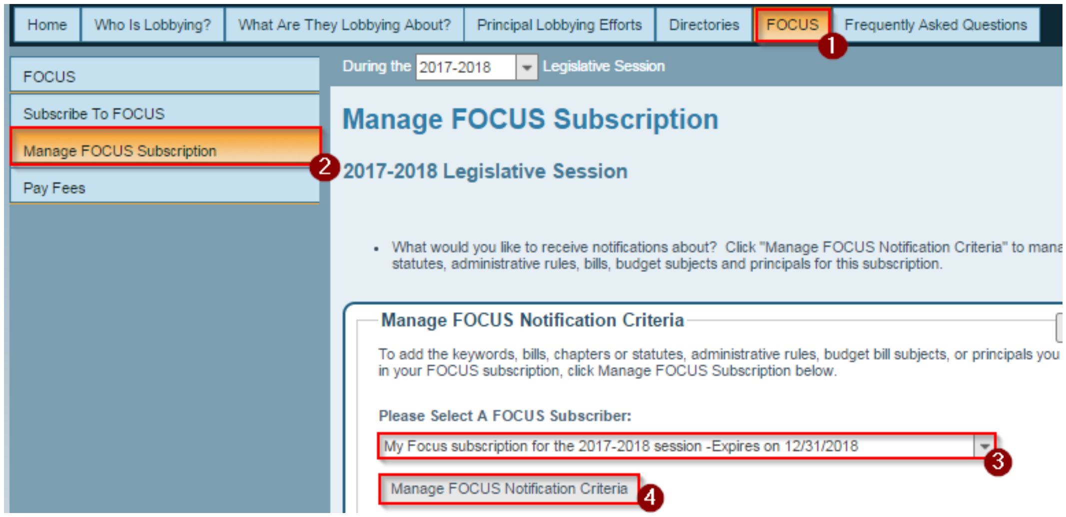
1. To create a user account, click **FOCUS** on the top navigation bar.
2. Click **Subscribe to FOCUS.**

3. Log in using the user account (Not pictured).
4. Click either **A New FOCUS Subscription for You** or **A New Focus Subscription For Another User** (Not Pictured).
5. Enter all of the required information: first and last name, email, address, phone number.
6. **Assign Permissions** is *optional* and allows the user to give another person with an Eye on Lobbying User Account the ability to update or modify that person's FOCUS subscription.
7. Click **Continue.**
8. Verify that the information is correct, and click **Confirm.** This will place the *FOCUS* subscription fee under **Pay Fees** on the left navigation bar.

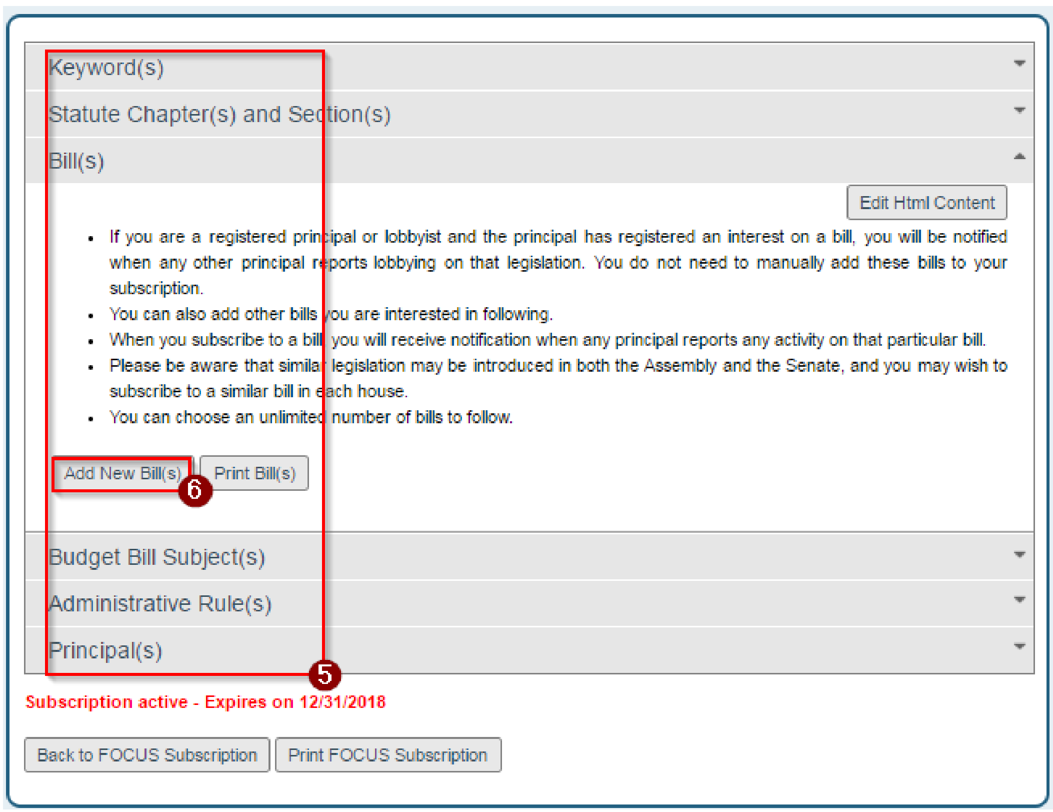


Manage *FOCUS* Subscription

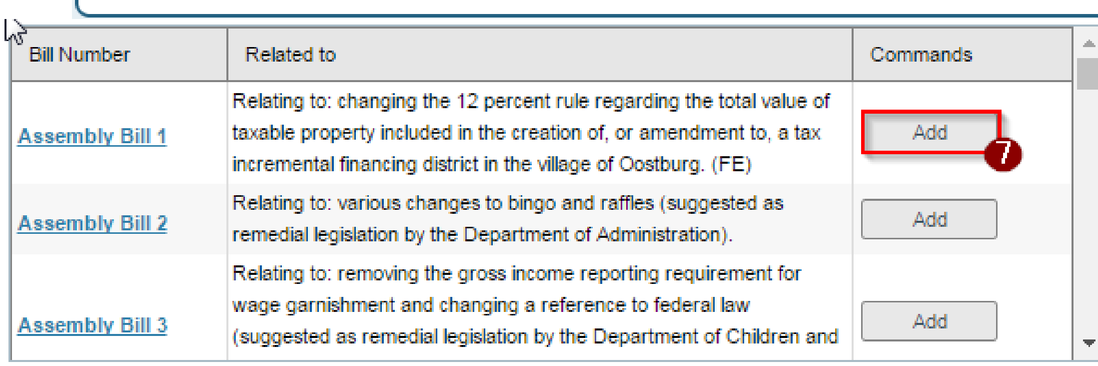
1. To manage a *FOCUS* subscription, click **FOCUS** on the top navigation bar.
2. Click **Manage FOCUS Subscription.**
3. Choose the appropriate subscription.
4. Click **Manage FOCUS Notification Criteria.**



5. Choose to be notified about keywords, statute chapters and sections, bills, budget bill subjects, administrative rules, and principals. Helpful tips are listed under each section..
6. For this example we chose to add a new bill.



7. Click **Add** for the appropriate bill. The bill will now be sent in the next *FOCUS* notification.



Contact the Ethics Commission

For *any* questions regarding this manual, lobbying regulation in Wisconsin, or if you would like additional information, please contact us at:

Lobbying@wi.gov
https://lobbying.wi.gov
(608)266-8123